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### Comics and co-evolutions

Vries, Rudolf Willem de

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# **COMICS AND CO-EVOLUTIONS**

A study of the dynamics in the niche of comics publishers in the Low Countries

**Rudi de Vries**



**Rijksuniversiteit Groningen**

**COMICS AND CO-EVOLUTIONS**

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the Low Countries**

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To Merel, and our children Emil and Lotta

In memory of my parents

## PREFACE

Writing the preface of a PhD dissertation is a kind of a ‘sentimental journey’ through time. Somewhere in the early 2000s I got the chance to write a PhD dissertation. The choice of the subject was up to me. A fruitful attempt to think out of the box led to my conclusion that what interested me most were the evolutions of the comics industry. I found it awkward that hardly any research had been done into this industry. Some people in my environment thought it quite absurd to do academic research about comics’ publishers, but my conviction that choosing this branch would in fact enable me to add something relevant to earlier research stimulated me to persevere.

Luckily I found two professors at my faculty willing to supervise me and assist me during the PhD process: Arndt Sorge and Arjen van Witteloostuijn. Other former PhD students who had the privilege to be supervised by them will probably agree with me that they are the best supervisors one can imagine. They combine an open mindedness and a dislike of bureaucracy with an enormous knowledge, a practical attitude, and, last but not least, patience. The latter was necessary in my case, because the period from the moment of approval of my final plan to the approval of the whole manuscript covered eight years, due to a limited amount of research time, and the combination with my work as a lecturer. In my moments of doubt, they stimulated me to continue. They always gave me sound and useful advice, did not force me in any direction, and showed a sincere interest in the subject. Arndt and Arjen: thanks very much.

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There are many other individuals and institutions to who I am grateful. To start with: I would like to thank my former lecturers Annie van den Oever and Rob Julien for introducing me as a colleague in the academic world, first as a



researcher, later also as a lecturer, working for both the Faculty of Economics and Business and the Faculty of Arts.

Working for two faculties often leads to practical problems, but also provides a varied working environment. Many (former) colleagues, both at the Faculty of Economics and Business (the GEM department, formerly IB&M, and before that Organization Studies) and the Faculty of Arts (the department of Arts, Culture and Media, formerly Arts and Arts Policy) make it worthwhile for me to work at the Groningen University.

I met many other people who are active in the Dutch and Belgian comics' world as a researcher, artist, publisher, organizer or writer, and who inspired, helped or stimulated me during the PhD process. I especially want to mention Ger Tillekens, Kees Ribbens, Jean-Marc van Tol, Pascal Lefèvre, Gert Meesters, the board and employees of the Dutch Comics Museum (I had the privilege of being a member of that board during seven years), the people at *Stripschrift*, Het Stripschap, and SDCN.

Hans Matla is mentioned in this book a number of times, not so much because he is a comics expert, publisher, and owner of the most complete comics collection in this country, but mainly because he is the author of *de Stripkatalogus*, a book with more than 800 pages that contains (almost) all Dutch language comic albums and magazines. Hans was so kind as to give me a copy of his 'opus magnum', that was very useful for my research.

Jos van Waterschoot en Ton Schuringa from Het Stripschap and SDCN provided me with the database that was the most important source for the quantitative part of my research. Thanks for your kind co-operation.

I want to thank all the publishers, artists, editors and distributors that I interviewed for my study. Not only were the interviews very relevant for me in order to get inside information, but I also learnt a lot from the personal stories about careers, passions, successes, and sometimes failures. Unfortunately I could not use the information about all publishing companies in this book, but I hope that it can be used for future publications.

I am grateful to Ad van den Oord. He introduced me in the wondrous world of Stata and event analyses, at the time that he was working for Antwerp University. Ad helped me a lot with the preparation of the data for the analyses. In later stages

I could always count on him if I was struggling with Stata. Also thanks to Antwerp University for allowing me to use their facilities.

I acknowledge the organizers of the EGOS-, IBDS-, Praagse Perspectieven- and ACME-conferences for giving me the opportunity to present parts of my research and discuss my ideas with other scholars.

Henny Wever, thanks for your fast work on the layout of the book, and Jet ter Heegde, thanks for the encouraging conversations and practical advice.

Thanks to my family and family-in-law for their interest and encouragement throughout the years.

My father bought me my first comic magazines and albums: the roots of this book. He and my mother always stimulated my sister and me to develop ourselves in the directions that we preferred. They would have been proud if they could have witnessed my earning a doctor's degree.

My friends had to endure my stories about the research during the whole period, and they still have remained my friends. That is fantastic. Hans, Coen, Casper and Jesse, thanks for your friendship and moral support. Jesse, thanks for your introducing me to the Charles University in Prague. 'Kolléega' Coen, thanks for checking the English language in the manuscript. For all the remaining errors I am to blame.

Merel: your support and patience were the major conditions for finishing this dissertation. I praise myself incredibly lucky with you as my partner. I am very proud of our children Emil and Lotta, and I am glad that from now on we will have more moments together again.

Rudi de Vries  
Groningen, October 2012



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## ABBREVIATIONS

ANT	Actor Network Theory
BD	Bande(s) Dessinée(s) (French for comics in general, but also used to refer only to comics produced in France and Belgium)
BDM	Béra, Denni and Mellot (authors of the French comics catalogue; the catalogue is generally referred to by this acronym)
C4	Four-firm concentration ratio (measure for level of market concentration; market share of the four largest companies)
CBS	Centraal Bureau voor de Statistiek (Dutch Statistics Office)
CHI	Comparative Historical Institutionalism
CP	Co-evolutionary Perspective
DGP	De Geïllustreerde Pers (name of publishing company)
DS	De Spaarnestad (name of publishing company)
h & r	hit & run publishers (organizations whose core competence is not publishing and that only produce comics for promotional purposes)
IB	International Business
IO	Industrial Organization
KB	Koninklijke Bibliotheek (Royal Library of The Netherlands)
MP	Média Participations (name of publishing company)
O&B	Oog & Blik (name of publishing company)
OE	Organizational Ecology
SDCN	Strip Documentatie Centrum Nederland (Comics Documentation Centre of The Netherlands; abbreviation mainly used for the database that was compiled by this organization)
SSZ	De Stripspeciaal-Zaak (Flemish-Dutch organization of specialized comic shops)
VNU	Verenigde Nederlandse Uitgeversmaatschappijen (United Dutch Publishing Companies; name of publishing company)





# CHAPTER 1

## INTRODUCTION

### 1.1 BACKGROUND

This dissertation is about the (co-)evolutions of comics publishing companies, the comics that are produced by them, and the actors and factors in and around these organizations.

Although the English name of the medium suggests otherwise, comic books are not necessarily comical. Dissertations are seldom comical, and the book lying in front of you does not aim at being an exception to that rule. There is, however, an aspect in which this thesis differs from other research in the areas of management studies and organization theory. This research often shows an aloofness from the organizations from which they have derived their knowledge.

Cultural industries, to which comics publishers belong, primarily depend on their creative input. In the comics industries this input is provided by the artists who draw or develop scenarios for comic books, and by the editors that intermediate between publisher and artist. Artistic creativity is essential for this organizational field, and this justifies specific attention for the artistic side of this industry, next to the more business-related aspects of the publishing companies. The artistic aspect makes cultural industries an interesting subject for organizational research. How do these organizations cope with the continuous tension between artistic and economic values? This is what Lampel *et al.* call the fundamental ‘balancing act’ of the cultural industries (2000, p. 263). For other organizations the most important lesson they can learn from the cultural industries is how to deal effectively with contrary imperatives (2000, p. 269).

## 1.2 ORGANIZATIONAL RESEARCH ON CULTURAL INDUSTRIES IN GENERAL AND COMICS INDUSTRIES IN PARTICULAR

Creative and cultural industries in general have gained importance internationally in the present knowledge economy and have been attaining more and more attention from sociologists and economic scholars in the last decades. Researchers from the field of organizational research have joined them, but this contribution is only a quite recent development. Because of this, there are still many lacunas in the knowledge of cultural industries. Peterson and Anand (2004) mention the need for more insight into the differences between production systems within cultural industries and their influence on culture. This is comparable with the plea of Scott for a structural-cultural analysis of the cultural industries:

*It is especially important that researchers examine the effects of organizational and industry structure on the products and services provided. How does the medium affect the message? After all, the products we are talking about are not shoes or sausages. The products of these industries are ideas, values, truths, and dreams: conceptions of who we are and what we could become. If the structuring of the organizations that create and distribute these products affects them in any way, we must seek to understand why and how.*

(Scott 2006, p. 308)

Lampel *et al.* (2006, p. 305) would like to see more research on cultural industries outside the USA. They perceive an overrepresentation of American cultural industries in academic journals.

In this study, I will address these issues: the focus is on European cultural industries, to be more specific: publishers from The Netherlands and Belgium. This specific choice will be explained below. An extended version of the co-evolutionary model, that includes the evolution of comics and of their values for comics producers, but also differentiates between organizations within the population of publishers, will be tested for its value added, by analyzing the developments within the comics industries both structurally and culturally.

There is another lacuna that I will fill in, or at least make a start with. I am referring here to the lack of research into the comics industries. Most studies about the cultural industries approach them as an undifferentiated whole, or focus on the organ-

izations behind motion pictures, recorded music and books in general. Research about comics industries from an organizational or institutional perspective is still quite rare. Among the scarce exceptions are sociological studies by Boltanski (1975), Brunsmann (1998), Lopes (2006 and 2009), and Brienza (2010). Taylor and Greve (2006) have written the only paper on comics industries so far that uses an organizational perspective, and that has been published in a highly ranked management journal. This scarcity contrasts with other research in humanities-related areas like cultural studies, semiotics, (art) history, mass communication and American studies, where, especially since the 1990s, an increasing interest in comics has led to many publications (books and papers), conferences and specialized, peer-reviewed journals.

The lack of attention for comics industries from organization science in comparison with other cultural industries is startling, because comics are a medium with an eventful history, and this is reflected in radical changes of its organizational field.

### 1.3 EVOLUTIONS OF COMICS AND THEIR INDUSTRIES

One of the most striking developments of comics is that from a neglected, even despised mass medium for children, to a cultural utterance for many market niches, including adults, that has the potential of literature and art.

In the United States as well as in Europe comic strips and stories appeared in magazines and newspapers since the 19<sup>th</sup> century. Very occasionally books were published of popular comics from these media. This began to occur on a more systematic basis in the 1920s and the 1930s, but the comic book industry only really began to boom in the 1940s, in Europe especially after the war (Kousemaker and Kousemaker, 1979; Rogers, 1997; Sabin, 1996; Wright, 2001). In the 1940s and 1950s comics were exposed to censoring measures by governments, educational institutions and publishers themselves in many countries, which caused a stigmatization of comics artists and audiences (Lopes, 2006). Nowadays comics are even subsidized by governments.

This recognition of comics as a form of art or cultural heritage first became visible in France. In the 1980s support for comics by the French government led to the institutionalization of comics. This became apparent in the yearly comics festival in

Angoulême, which after it received subsidies from the Ministry of Culture and the local government, grew out to be the largest, most important comics festival in Europe. Many expositions dedicated to comics in French (general) museums, a specialized comics museum and a training college for young comics artists, were also supported by the French ministry of culture and other governmental institutions. This certainly has contributed to the important role of France in Europe as a producer and innovator of comics. Indirectly it also led to support for comics from governments in neighboring countries, like Belgium and The Netherlands.

Originally comics were published by the publishers of general magazines and newspapers, later specialized comics publishers entered the market, and since the beginning of the 21<sup>st</sup> century more and more book publishers (specialized in literature or other fiction genres) entered the market with ambitious comics for adult audiences. Another important evolution is that from a 'dependent' medium to an independent medium. In the early days of comics they filled just a small space or (in the case of US newspapers) some pages in general magazines and newspapers, then they got their own, specialized magazines, and finally they were published in books and albums<sup>1</sup>. The album format became the dominant format for comics in Europe. Since the rise of the graphic novel the alternative size is that of a book.

Comics have evolved during the last decades, and both strategic choices of organizations and artistic innovations laid the foundations for that. These developments have changed the position of publishers and comics artists drastically. The artists themselves, especially the more ambitious among them, played a very important role in the evolution of comics. Avant-garde and underground artists started their own publishing companies in the 1960s and 1970s, which gave them more autonomy in their creations. Institutions like critics, media, societies of fans, and finally governments have played a role in the recognition of comics, often as a reaction on artistic initiatives.

However, the nature of these institutions and the level of comics' legitimacy varies between countries. Differences between national institutions and their influence on cultural industries are subjects that have hardly been dealt with in academic literature thus far, although cultural industries like comics publishers often operate on

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<sup>1</sup> 'Comic album', shortly 'album', is the common denominator for comic books with complete stories in a.o. France, Belgium and The Netherlands.

international markets. A related matter that has lacked the attention one would expect concerns cultural differences between the countries in which cultural industries operate, and the consequences for the organizations involved.

The rise of underground comics in the 1960s cannot be seen separately from societal developments like the rise of youth culture and counter-movements. The more recent phenomenon of the graphic novel, the literary comic for adults, is related to a further democratization of culture, and to a general change of a 'word'-culture into a culture of images. In addition there are demographic variables that have played a role, like the aging of generations that were born in the 1940s, the 1950s and early 1960s. Especially these generations, that read comics in their childhood, also brought forward the producers (publishers and artists) of new comics and the audiences that participated in the evolution of the comic book, either actively or passively. In Europe (at least in France, Belgium and The Netherlands) this participation even extends to Ministers of Culture who read comics as a child or adolescent and, as an adult, developed policies to support institutions for comics (like comics museums, awards for artists and comics festivals) and grants for creators of graphic novels, when they got into the position to do this.

#### **1.4 DIFFERENCES BETWEEN COUNTRIES WITH REGARD TO EVOLUTIONS OF COMICS INDUSTRIES**

Every country has its own comics culture and publishers, although there are border-crossing comics and comics-multinationals as well. The American superheroes, Disney characters and newspaper comic strips like *The Peanuts* or *Garfield* are known worldwide. Japan has its own, flourishing manga industry, for which export to other Asian countries, America, and more recently also to Europe has become important. The more popular comics are often licensed to other countries, and this is a major source of income for publishers.

Europe also has its own comics history. Here I will focus on Belgian and Dutch comics, because these are the subjects of this study. The developments in France will also be addressed, because of the cultural interaction between Wallonia and France, and the influence that French innovations of comics had on Walloon and other publishers.

The Franco-Belgian comics around characters like *Tintin*, *Asterix*, and *Lucky Luke* have become internationally bestselling evergreens. They are evergreens indeed, because these series were launched more than fifty years ago, and are still reprinted and popular. In the middle of the previous century the Belgian ‘schools’ of artists who filled the pages of the comic magazines *Spirou* (the home of *Lucky Luke*, among many others) and *Tintin* have been very influential, and caused the French speaking part of Belgium (Wallonia and Brussels) to be the center of the European comics.

The magazines, and the albums derived from them, were not only available in the French, but also in the Dutch language (Flemish) editions, because of the bilingual population of Belgium. They were exported to other French and Dutch speaking countries, like France, Swiss and The Netherlands, and gradually became popular elsewhere. The creator of *Tintin*, Hergé, is considered to be the godfather of 20<sup>th</sup> century European comics. The publishers Dupuis (*Spirou*), Lombard (*Tintin* magazine and albums, except those of Hergé’s character *Tintin* himself) and Casterman (Hergé’s albums, a.o. *Tintin*) had a leading position in the comics niche in the middle of the last century.

Flanders, the Dutch speaking part of Belgium, also has a high production of originally Dutch language comics, but many of the typically Flemish family comics are only popular in their home market. Although all of the Flemish series are published in Dutch, they are hardly sold in The Netherlands, with the exception of *Suske & Wiske*, who are even more popular there than in Flanders.

Since the 1960s, starting with the magazine *Pilote* (birthplace of *Asterix*, published by Dargaud), France gradually took over the role of Belgium and at the end of the 20<sup>th</sup> century became the largest producer of comics in Europe. In the 1970s new, specialized French publishers introduced innovative comics for other (older) audiences than just children, in which the role of the artist became more important than in the Belgian comics. The collaboration between Belgian and French publishers and artists intensified, which led to adaptations by Belgian publishers of the French innovations. France and Belgium became the main European export-centers of comics. The international success of French language comic albums is remarkable itself, for it shows that the markets of (traditionally) popular culture are not by definition dominated by Anglo-Saxon countries, as is the case with motion pictures and pop music.

In The Netherlands the situation is completely different. A limited number of comics of Dutch origin are successful nowadays, but hardly any of these is known abroad. In the past The Netherlands had a much stronger position on the European comics market. After 1945 and until the early 1950s the Toonder studios, started during the war by the most influential Dutch comics artist Marten Toonder, were important exporters of Dutch comics.

Whereas until the 1960s the production of originally Dutch comics exceeded the supply of translated comics, this situation has been reversed since then. The number of imported and translated comics in The Netherlands is now far higher than that of exported comics. Some of the innovative comics trends in France have been introduced in The Netherlands, but on a smaller scale than might be expected when looking purely at the demographic differences between the two countries.

As may have become clear from the description above, the position of comics and their publishers varies enormously between countries, and there have been many developments that have changed these positions during the last five or six decades.

The differing histories of comics in the countries will also be reflected in their sales. Unfortunately, comparable sales data on a national aggregation level from all three countries are hardly available. Unlike the record and the movies industry, there is no international organization in the area of comics that collects these data. The information can only be derived from market-research organizations that work on behalf of general publishing industries, and these only mention sales of comics as a separate category if they are high enough.

In the few years that sales figures have been collected about The Netherlands, (both parts of) Belgium, and also of France, differences in methods of collecting data make it difficult to make a valid comparison. Table 1.1 gives an indication, by using data for the year 2006, one of the few years of which data could be found for each of the three countries. The differences between France and Belgium on the one hand and The Netherlands on the other hand, are striking. It is clear that in the first two countries comics are far more popular than in The Netherlands. Within Belgium, Wallonia is more comics oriented than Flanders. In France les Bandes Dessinées (or BD) as comics are called there, are ‘hot’ in the first decade of the 21<sup>st</sup> century: they belong to the fastest growing book genres, with more than forty million albums sold annually (GfK, 2007). There is an enormous variety in supply, and they get a lot of exposure in the media. In both parts of Belgium comics are



**Table 1.1 Comic album sales in 2006; France, Belgium and The Netherlands compared<sup>1</sup>**

	France	Wallonia	Flanders	total in Belgium	The Netherlands
sales of comics (x 1000 €)	383,000	38,727	11,808	50,535	3,981
total sales of books (x 1000 €)	2,672,000	253,373	124,135	377,508	528,372
inhabitants (x 1000)	62,999	4,229	6,282	10,511	16,334
comics sales per inhabitant (in €)	6.08	9.16	1.88	4.81	0.24
share of comics in book sales (%)	14.3%	15.3%	9.5%	13.4%	0.8%

*sources: France: GfK (2007), Wallonia: Ministère de la Communauté française (2008), Flanders: Boek.be (2008), The Netherlands: GfK Retail and Technology / Stichting Marktonderzoek Boekenvak (2009).*

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<sup>1</sup> NB: Because of the differing methods of data collecting, these figures are no more than an indication. With regard to the Dutch comics sales, GfK Retail and Technology admitted [to the author – RdV] that the actual numbers are certainly higher, a.o. because sales at comics shops (approximately ninety in 2006) were not counted. However, even if the actual Dutch sales of comics are three times as high as mentioned in the table (an estimation that would include the sales at the comics shops), the relative differences between the Netherlands and both other countries still remain remarkable.

also popular, certainly in comparison with The Netherlands, where they are no more than a very small niche.

There are other data that make a comparison possible, like those concerning the numbers of readers of comics in every country, and the yearly production of comic albums. These data will be presented below.

In each of the countries (and country parts), recent data are available that give an insight into the interest for comics among readers. These data are from national enquiries about cultural participation, and are representative for the whole population. The surveys include hundreds of subjects; the interest for different types of books was one of them. The question to the respondent was whether he or she had actually read one or more comic books in the twelve months before the enquiry took place (only in Flanders was this period limited to six months). Table 1.2 gives an overview of the percentages of respondents that answered affirmatively.

**Table 1.2 Readers of comic albums**

country	readers of comic albums, in percentages of total population*	estimation of absolute numbers of comics readers	year of most recent enquiry
France	29%	16 million	2008
Wallonia	36%	1.3 million	2007
Flanders	22%	1.2 million	2009
The Netherlands	14%	2 million	2005

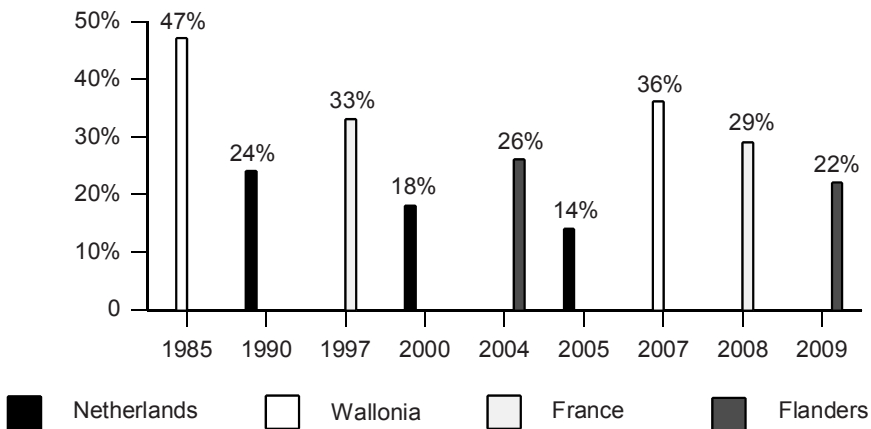
\* Percentage of respondents who have read at least one comic album in the twelve months previous to the enquiry, except Flanders: in the six months previous to the enquiry.

Sources: *The Netherlands: TBO (2005); Flanders: Lievens and Waeye (2011); Wallonia: Ministère de la Communauté française (2009); France: Ministère de la Culture et de la Communication (2011).*

These data show the same pattern as the sales figures: in Wallonia comic albums are the most popular, followed by France, Flanders and finally The Netherlands. In France the interest for comics is twice as high as in The Netherlands. If we translate the percentages to absolute numbers of readers in each country, we see that there are eight times as many readers of comic albums in France compared

with The Netherlands: sixteen million versus two million readers (although there are less than four times as many Frenchman as there are Dutchmen). In absolute numbers Belgium (Flanders and Wallonia together) with its ten million inhabitants, has more comics readers than The Netherlands with a population of sixteen million. Within Belgium Wallonia (four million inhabitants) has more comics readers than Flanders (six million inhabitants).

**Figure 1.1 Changes in reading of comic albums, in percentages of total population**

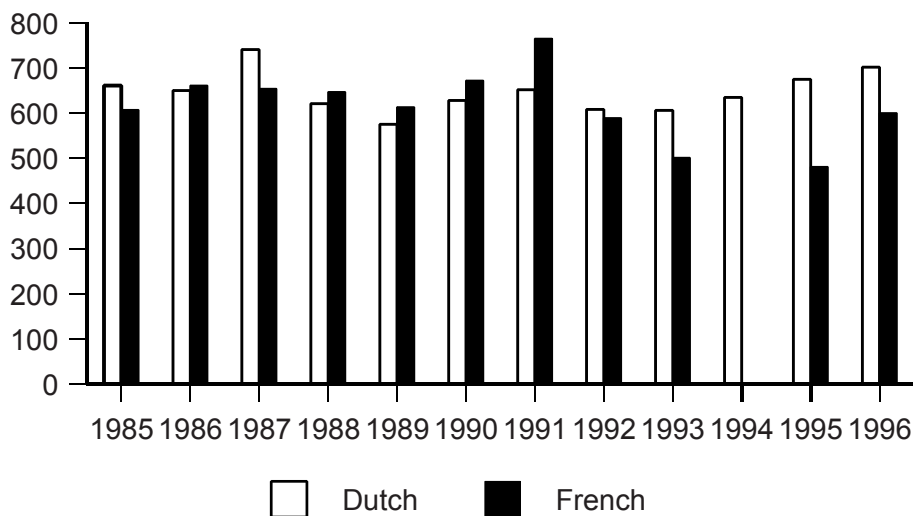


On the x-as only the years are shown in which data for at least one country were available

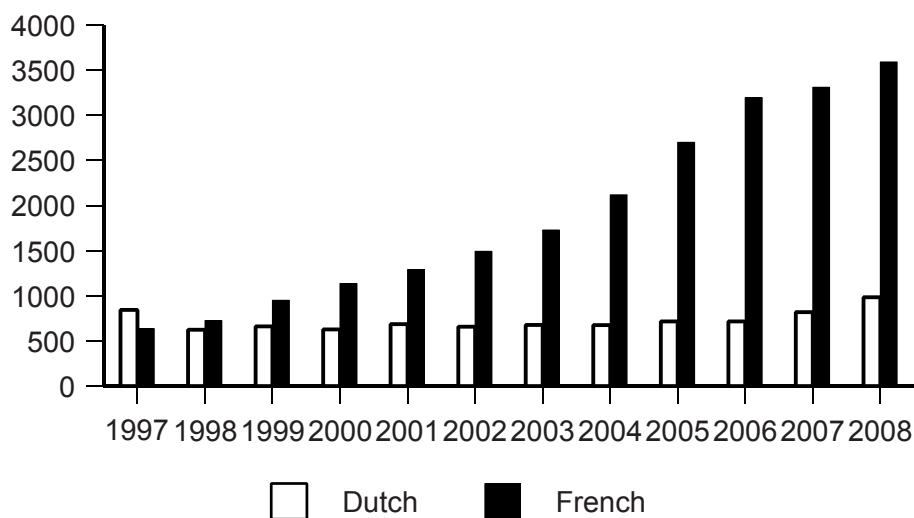
The percentages above only show the most recent findings, but in every country-(-part) mentioned above at least one earlier survey was held in which the same question was asked about comic albums. The years in which these enquiries took place differ by country, but nevertheless a comparison between the earlier and the most recent data give an insight into the changes in the interest for comic albums. Figure1.1<sup>1</sup> gives an overview.

<sup>1</sup> Sources: The Netherlands: TBO (1990, 2000, and 2005); Flanders: Lievens and Waeghe (2006 and 2011); Wallonia: Ministère de la Communauté française (2009); France: Ministère de la Culture et de la Communication (2011).

**Figure 1.2a Title supply of Dutch and French language albums in the period 1985-1996**



**Figure 1.2b Title supply of Dutch and French language albums in the period 1997-2008**



The general tendency is that the percentages of comic album readers have become smaller. In 1985 this percentage was extremely high in Wallonia (47%) in comparison with the other countries. This difference has become smaller according to the most recent surveys, at least with regard to France and Flanders. In The Netherlands the decrease was relatively stronger than in the other countries: whereas in 1990 almost one out of every four Dutchmen (24%) still answered to have read at least one comic book in the previous year, this has been reduced to almost one in every seven Dutchmen in 2005 (14%).

To conclude our comparisons, we shall use data with regard to the production of comic albums. These have a limitation: in the Dutch and Flemish sources all Dutch language comic albums are taken together, and the same thing happens in the French and Wallonian sources for the French albums. Figure 1.2 shows the supply of album titles in the period 1985-2008. It becomes clear that the supply of French language albums has grown enormously, especially since the end of the 1990s. Whereas before that time the supply of French and Dutch language comics was more or less comparable, nowadays that balance is lost. In 2008, the last year that I have included, more than 3,500 French language comic albums and 1,000 Dutch language comic albums were published.

As the findings concerning numbers of readers show (see Figure 1.1), this growth of production is not caused by an increase of readers on the Francophone market. On the contrary, the percentages of readers in Wallonia and France have dropped. This indicates that there is a risk of (massive) overproduction on the Francophone market.<sup>1</sup>

All these differences, which of course have consequences for publishers, make it interesting to choose these neighboring countries as the subjects for our study. The fact that they also have differing cultures, governmental structures and business systems makes them even more suitable for a comparative research.

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<sup>1</sup> Which is indeed confirmed by the French study *L'Etat de la BD* (2009) that is entirely devoted to the consequences of the overproduction.

## 1.5 INTRODUCTION OF THE THEORETICAL FRAMEWORK AND RESEARCH QUESTION

Until now I have mentioned several contexts that together are the domain of this research: dynamics of comics industries, evolutions of comics themselves, the role of publishers, artists, national institutional factors, and general environmental factors. The dynamics of these actors and factors show strong interdependencies. It also became clear that it took a long time for comics to reach a certain level of legitimacy.

To find out how comics and their producers developed in the course of years, theoretical concepts are needed that make it possible to acquire more understanding about the interdependencies and their effects on publishers, and that show at what moment in time and in which order a change in one variable also caused changes in others. In other words: the role of history must be an integral part of the theoretical perspective.

In the abundance of theories from organization science that saw daylight in the past decades, there are especially two that seem fit for my purposes, and that will be used in this book: the co-evolutionary perspective (CP) and organizational ecology (OE). CP and OE study populations of organizations (macro-side) and their changes through time. Both include the historical aspect, be it that they approach it in a different way: the former uses a combination of quantitative and qualitative methods and data, the latter mainly quantitative methods, like statistical analyses.

In contrast with OE, CP also pays attention to the micro-side: the contributions of individual firms. Instead of using just one perspective, and possibly add improvements to that, I shall combine the two, and in that way improve both.

Moreover, data collected on the individual and organizational level will be provided with more dimensions than has been done until now within co-evolutionary research. For this purpose, concepts from institutional logics proved necessary.

Finally, because of the need for specific information about the cultural dimension of the comics industries, especially with regard to the values attached to cultural products, concepts from art sociology are used.

An advantage of these choices is that combinations of theoretical perspectives add value to organizational research based on only one theoretical view and bring to light strengths and weaknesses of the separate views (see a.o. Baum & Oliver, 1992; Boone & Van Witteloostuijn, 1995; and Oliver, 1997). In organizational research about cultural industries, integrated conceptual models have already proved their value (Castañer & Campos, 2002; Huygens *et al.*, 2001; Jones, 2001).

A cross-contextual topic like this can hardly be dealt with in a proper way if approached from only one theoretical perspective. The CP in my interpretation (in which I strongly lean on models introduced by a.o. Lewin and Volberda, 1999 and 2003) is already an integration of varying, sometimes contrasting organizational paradigms, as I will explain in the next chapter. Nevertheless there still are possibilities to make CP even more valuable. My main theoretical contribution will be to do this by integrating CP with concepts from OE, institutional logics and art sociology, and then test the added value of the model for co-evolutionary research into the cultural industries.

On the basis of the choices introduced above, the main research question is:

*Which (co-)evolutions took place within and around the comics industries in The Netherlands and Belgium, and how can they explain the different position of comics and their publishers in these countries in the beginning of the 21<sup>st</sup> century?*

## 1.6 STRUCTURE OF THE BOOK

In the next chapter the theoretical perspectives touched upon in the previous pages, will be discussed in detail, and the conceptual framework will be introduced. Chapter 3 describes the methodology. Subsequently the specific field of comics, comics industries, and their histories, will be described in Chapter 4. This provides the necessary background information for the analyses on both macro and micro level in respectively Chapter 5 and 6. In the concluding Chapter 7 this information will be put into the extended co-evolutionary perspective.

# **CHAPTER 2**

## **THEORETICAL FRAMEWORK**

### **2.1 INTRODUCTION**

In this chapter the overarching theoretical framework for this research will be presented. The most important characteristic of the co-evolutionary perspective (CP) that provides the main paradigm for this framework is that it integrates differing, sometimes contrasting theoretical streams. Co-evolutionary researchers have been supported by others, who also have pleaded for more synthetic models, instead of adding more new theories and models to the enormous variety that has already been developed within organization science.

Section 2.2 is devoted to attempts and proposals to integrate already existing theories. Subsequently in Sections 2.3 and 2.4 the co-evolutionary research will be introduced and discussed. The theoretical shortcomings of CP for the purpose of this research will be overcome by using concepts from other domains: Organizational Ecology (OE), comparative historical institutionalism (CHI), institutional logics and art sociology. OE concepts are the subject of Section 2.5. Subsequently Section 2.6 introduces CHI. Section 2.7 is about institutional logics and art sociology, which overlap each other to a certain extent. Finally, in Section 2.8 the theories are integrated in a model.

### **2.2 COMBINATIONS OF THEORIES**

#### **2.2.1 Why combine theories?**

Just using one theory may make analyzing organizational phenomena more comprehensive, but it is also risky, because it can result in a limited, in some cases even one-sided explanation of structures and processes. However, combining theories does not make research easier, because it implies that one needs the knowledge of



originally separate theories. An awareness of their strengths and weaknesses is a necessary condition for applying them or further improving them in the right way. Especially in the late 20<sup>th</sup> century it became acknowledged that there is no general theory that is able to explain everything.

Organization theory itself has developed into an amalgam of influences from other sciences, including economics, sociology, psychology, biology, anthropology and cultural studies. The insight that just one approach might lead to a reductive view of reality was already known in less primitive cultures than ours, as is so fittingly described by among others Hatch (1997, p. 7) when she uses the old Hindu parable of the six blind men and the elephant, in order to motivate the choice for offering multiple perspectives in her book *Organization Theory*. The choice for multiple perspectives or combinations of theoretical angles enhances the chance that organizational research actually reflects the nuances of reality.

### **2.2.2 Conceptual marriages between rivaling theories: micro versus macro, voluntarism versus determinism**

There are many ways in which organization theory can be put into categories, and often these are related to the level of analysis: research focuses on the micro or the macro level, and sometimes on the meso level. The chosen perspective, either that of the individual organization or manager, or that of an organizational field or ecology, leads to different concepts and applications. Theories that provide knowledge at the macro level alone do not zoom in on the behavior of individual firms. Likewise, theories that analyze the strategic behavior of individual organizations do not pay much attention to the consequence of a chosen strategy for a whole field of organizations.

Theories like organizational ecology and neo-institutional theory are often criticized for being deterministic (Boone and Van Witteloostuijn, 1995, p.272) by strategic management theorists. In the perspective of strategic management, the free will of the manager is the focal approach, but this voluntarism does not prevent the firm from being exposed to larger, environmental factors that cannot be influenced that easily by an individual strategy.

### 2.2.3 Intertwinement of strategic and institutional processes

Especially in the nineties of the last century, scholars began looking for ties between the streams of research that had been developed in the decades before, and succeeded in showing that integration would not be impossible, and could have a surplus value vis-à-vis the use of just a single theory (McKelvey, 1997). Oliver (1991) showed how strategic and institutional processes are intertwined and because of that should also be studied together. This is possible and even necessary, although the theories analyzed by her - the neo-institutional perspective, and the resource dependence perspective - are quite opposed to each other in many aspects.

The most important difference is that according to the neo-institutional approach organizations are passive and formed by their environment, whereas the resource dependence perspective says that organizations can make active choices and change their environment. Oliver makes clear that organizations do have a variety of alternative strategies that can either be resisting or conforming to the institutionalized environment. In 1997 she applied the same idea, combining the resource based view with institutional theory (Oliver, 1997). Here her premise is ‘that institutional factors surrounding resource decisions can affect the potential for firms to earn economic rents’ (1997, p. 698).

Although the resource based view pays attention to both internal and external influences, its considerations mainly rest on the neo-classical economic model, leaving aside institutional forces like the ones DiMaggio and Powell (1983) discerned. The neo-institutional theory predicts homogeneity among organizations in the same field, whereas according to the resource based view the differences between specialized, inimitable resources and resource market imperfections lead to heterogeneity. One of Oliver’s important contributions is that she shows convincingly that firms need both resource capital and institutional capital in order to survive in the longer term (Oliver, 1997, p. 709).

### 2.2.4 Relationship between institutional and ecological dynamics

Baum and Oliver (1992) integrated the concepts of population density and relational density from respectively population ecology and neo-institutional theory, in order to show the relationship between institutional processes and population dyn-

amics. When variables derived from both concepts were included in a model, the analysis showed that variance within the institutional embeddedness of the organizations helped explaining the variance within the population itself. Organizations with direct relations to their institutional environment had a higher survival chance than organizations lacking these ties.

### 2.2.5 Legitimacy

Suchman (1995) synthesizes knowledge derived from strategic and neo-institutional approaches in order to analyze the linkages between the legitimacy of the organization and its products on the one hand, with the strategic actions of the individual organization on the other. His paper provides a systematic overview of the aspects of legitimacy.

Legitimacy is one of the core concepts that are shared by OE and institutional research, and in fact the most important addition from social sciences to the economic principle of competition. Together these concepts provide insight into selection processes within organizational populations. At the same time legitimacy is perhaps the most complex concept, because it can be interpreted in many ways, and is difficult to operationalize. In highly institutionalized contexts like those of art and culture, legitimacy is even more important than competition. For this reason it also will get attention in this research.

After a theoretical introduction, in which legitimacy is defined and the concept is discussed, Suchman continues with a differentiation between three types of legitimacy, and finishes with the practice of managing legitimacy. Suchman's definition of legitimacy is:

*Legitimacy is a generalized perception or assumption that the actions of an entity are desirable, proper or appropriate within some socially constructed system of norms, beliefs and definitions.*

(Suchman, 1995, p. 574)

Legitimacy is important for organizations for several reasons. These can be reduced to two dimensions: continuity versus credibility, and seeking active versus passive acquiescence. From the point of view of strategic management, legitimacy

is seen as an instrument of the organization, whereas from the neo-institutional perspective it is a set of constitutive beliefs in an organizational field. Organizations try to improve the legitimacy of their organization, but their attempts to do so are strongly influenced and constrained by their field.

Suchman discerns three types of legitimacy:

1. pragmatic,
2. moral, and
3. cognitive legitimacy.

Pragmatic legitimacy is about acceptance because of self-interest of an audience. Moral legitimacy is related to norms and cognitive legitimacy to the comprehensibility of the organization and its products. The latter is the most difficult to manage for individual organizations, because this concerns dealing “both with larger belief systems and with the experienced reality of the audience’s daily life” (1995, p. 582), or in other words the subtle, but fundamental issue of taken-for-grantedness. In the course of time, legitimacy may shift between the three levels. When cognitive legitimacy is reached, the organization has the advantage that this is sustainable and not likely to be lost very quickly again.

In the third part of the paper Suchman describes how organizations can manage legitimacy: how can they gain it, maintain it, and if things go wrong, how can they repair it? The most complex aim for new types of organizations/products is how to gain legitimacy: organizations alone can hardly do anything here, but they can unite as a field, and try to create objectivity, in order words institutionalize. Suchman finishes with stressing that researchers should either explicitly address all three types of legitimacy (pragmatism, morality or cognition), or clearly mention which one of these is central in their analysis.

Suchman’s differentiation of legitimacy into three categories (pragmatic, moral and cognitive legitimacy) will be used for our purposes, in order to discern different dimensions within the legitimacy of comics and their producers.

### 2.2.6 ‘Old’ and neo-institutionalism

The neo-institutional theory that is referred to above, was developed by a.o. DiMaggio and Powell (1983), and Meyer and Rowan (1977), and is a reaction to the institutional theory, that was already introduced in the 1950s by Selznick (1957). Institutionalization can be defined as ‘the process by which actions are repeated and given similar meaning by self and others’ (Scott, 1992, p. 117). Neo-institutional theory and organization ecology agree about the importance of social legitimacy for the survival of organizations. The other crucial factor is competition, and this factor gains weight in less institutionalized environments. Whereas the original institutional theory focused on individual organizations and informal institutions, the neo-institutional theory studies the effect of formal institutions on organizational fields. The neo-institutional theory is similar to the best known economic interpretation of institutional theory by North (1990), who defines institutions as ‘the rules of the game in a society or, more formally, [...] the humanly devised constraints that shape human interaction’ (1990, p. 3). Attempts have been made to integrate both versions of the institutional theory, by among others Hirsch and Lounsbury (1997) and Greenwood and Hinings (1996).

Hirsch and Lounsbury (1997) miss the link between environmental changes and activities of individuals and organizations, and argues that “details of micro-action are needed to explain how macro-level institutions change” (1997, p. 408). The authors propose reconciliation between the old and new theory, because they complement each other. Interestingly enough, they also discuss Bourdieu’s (1988) concepts of the habitus and field analysis which at first sight are quite similar to the neo-institutional perspective. Bourdieu is not only an organizational sociologist: he studies individual actors, social classes and institutions. He combines an anthropological interest for (individual) social agents with analysis of (macro) organizational structures, and by doing so in fact integrates old and new institutional views. As we will see later in this chapter (Subsection 2.6.2), Bourdieu’s integration is not even going far enough for younger generations of art sociologists like Heinich.

Greenwood and Hinings (1996) come to the same conclusion as Hirsch and Lounsbury, after having developed a framework in order to understand radical organizational change. In their paper they examine the interaction between (external) organizational context and (internal) organizational action. Organizations are almost always part of a larger field, but they can make their own choices. These choices are affected by informal institutions within the organization, like norms, values and

attitudes. If the field within which organizations are active is highly institutionalized, the effect of their choices is limited. The degree of institutionalization varies, however. The neo-institutional perspective only focuses on convergent dynamics within the whole field, and therefore would render a one-dimensional view of reality. By integrating old and neo-institutional perspectives, the authors are able to differentiate between more and less institutionalized environments. This helps in understanding the differences between convergent and divergent or radical change, and of evolutionary and revolutionary change across and within institutional sectors.

### 2.3 THE EVOLUTION OF THE CO-EVOLUTIONARY PERSPECTIVE

In all the cases above, the integration of models and theories have shown the possibilities and advantages of such an approach, and certainly also their theoretical necessity. But they have not led to a new, overarching theory, except for one approach, that we will discuss now: the co-evolutionary perspective.

Co-evolutionary research, which describes the dynamics of competition and capabilities of organizations operating in the same environment, integrates theoretical perspectives, combining organization theory, strategic management and sociology (Lewin and Koza, 2001). Evolutionary and co-evolutionary ideas, originally introduced by Darwin, were imported in economics by among others Nelson and Winter (1982) and in the field of organization studies by among others Baum and Singh (1994). Lewin, Volberda and others developed the concepts of these pioneers by systematically working out models and using them for their own research agendas. In their first, conceptual introduction of co-evolution Lewin and Volberda define co-evolution as “the joint outcome of managerial intentionality, environment, and institutional effects” (1999, p. 526). The authors show how the theories that have been mentioned above are integrated into the co-evolutionary view. Among these are organizational ecology and neo-institutional theory, which address the macro level of organizational fields, and the resource based view, which addresses the level of the individual firm. Firms derive their competitive advantage from heterogeneity in resources and capabilities (Lewin and Volberda, 1999, p. 522; Barney, 1991). The distinction between co-evolution at a micro level (co-evolution within the firm) and at a macro level was already made by McKelvey (1997), one of the

first authors who wrote on a meta-level about the paradigmatic position of co-evolutionary theory in organization studies.

Research from the co-evolutionary perspective (from now on: CP) combines analysis at a micro level with analysis at a macro level. It attempts to explain the complex, reciprocal relationship between evolutions of individual organizations and evolutions of the organizational field within which they operate. CP looks at the possibilities and limitations for individual organizations to either adapt to or manipulate their environment - in other words: explore or exploit, innovate or copy - and integrates these with selection processes within the whole population. The co-evolution framework will, moreover, “inform any research in organization studies, which spans levels of analysis and involves adaptation over time” (Lewin and Volberda, 1999, p. 520). The evolution never stops: the interrelationship between adaptation and selection leads to a continuous search behavior: any unique competitive advantage gets lost in the course of time, so every organization has to keep on searching to keep in position.

A basic assumption is that there are “multidirectional causalities between micro and macro co-evolution, where the distinction between dependent-independent variables becomes indeterminate, and where changes in any one variable may be caused endogenously by changes in the other” (Lewin and Koza, 2001, p. VII). Adaptation is path- or history-dependent in these processes. Another property is the multilevelness of co-evolutionary effects. Evolutions are not linear: changes in one variable can have quite counterintuitive effects on other variables, across levels of analysis. This means that in order to understand evolutionary changes, one has to consider the relationship between many variables, at many levels.

Lewin and Volberda (1999, p. 527-528) sum up basic requirements for co-evolutionary research: first, the organizational adaptations should be studied over a long period of time, by using time series and ‘micro-state adaptation events’.

Examples are product changes and new product introductions. The evolutions of the organizations should also be put into a historical context. Next to this the researcher has to consider which multidirectional causalities between micro and macro co-evolution are possibly relevant. One also has to take path dependencies into account, and changes occurring at the level of institutional systems in which the organizations in question are embedded. Finally, relevant economic, social and political factors have to be identified. The data needed for this kind of research

include detailed, archival data sets, which limits the horizon of evolutionary research. CP can be used to analyze the emergence of new organizational forms, and the adaptation and selection processes within a field (Lewin and Koza, 2001).

In their second conceptual paper, Volberda and Lewin (2003) refine their theory. The authors zoom in on the micro co-evolutions within firms: according to them co-evolutionary studies must focus on the interactions between individuals, and between units within multi-unit firms, and on the way in which these processes are intertwined with the competencies of the whole population. By making this conceptual choice the attention shifts towards the strategic possibilities of the organizations, whereas earlier there was at least a theoretical balance between external selection and managerial intentionality. Volberda and Lewin (2003) add four co-evolutionary paths to the original concepts: naïve selection, managed selection, hierarchical renewal and holistic renewal. Managed selection leads to the most balanced combination of selection and adaptation. A crucial principle for self-renewing organizations is that they synchronize concurrent exploitation and exploration.

Madhok and Liu (2006) introduce CP in the area of international business. A theoretical addition to the already collected knowledge is that there is a dis-synchronization effect or dynamic imbalance between macro and micro co-evolutions, caused by “the speed differential between macro evolution and micro-evolution” (2006, p. 19). This imbalance is caused by causal ambiguities within the individual firm and the limited absorptive capacity of the firm or its units. Whereas changes at the macro level happen continually, internal changes are constrained.

Among the studies that use CP, there are several about cultural industries (Djelic and Ainamo, 1999; Huijgens, 1999; Jones, 2001; Huijgens *et al.*, 2001; Lampel and Shamsie, 2003). These show that the theory can be applied successfully in the cultural industries and provide insight into historical processes with consequences for the organizations involved. Nevertheless, there are omissions in these papers. Especially the lack of attention to the meaning of culture for people is striking. This is one of the limitations of co-evolutionary research that will be discussed in the next section.



## 2.4 LIMITATIONS OF CO-EVOLUTIONARY RESEARCH UNTIL NOW

### 2.4.1 Diversity within evolutions

A relatively weak point of co-evolutionary models in general, is that they suggest that all organizations within a population change into the same direction, according to the Variation-Selection-Retention principle: after a period of variation, selection processes take place, and organizations that are best equipped for the new circumstances remain. In reality, things might be more complex. Even within one industry different kinds or organizations might evolve in different ways. The co-evolutionary models do not include concepts that make a further differentiation within a population possible.

### 2.4.2 Cross-societal comparison of institutions

There are co-evolutionary studies that compare the influence of national institutions on co-evolutions between countries (a.o. Flier *et al.*, 2003; Murmann, 2003). Djelic and Ainamo (1999) have written one of the few co-evolutionary papers from such a comparative approach about the cultural industries, with their study of new organizational forms in the fashion industry in France, Italy and the United States. Most of these studies however do not make use of concepts that can help us understand how organizations are embedded in a society with a specific identity, and how this affects their evolutions. Such concepts might provide a more accurate explanation for divergences in the developments of the same industries in different countries.

### 2.4.3 The role of individuals

A third limitation in the research methods of many co-evolutionary papers is that data at an individual level are only seldom collected (with Huijgens, 1999, as one of the positive exceptions). Often the data are derived from historical archives and secondary literature. However, first-hand information at an individual level about the internal and external interactions is necessary to understand these processes, according to Volberda and Lewin (2003). Djelic *et al.* call this a ‘missing link’:

*Individual actors and social networks are [...] a presence, a connecting link and a dynamic mechanism explaining in part an historical co-evolution between firms (their strategies and organizational forms), market structures and practices and wider institutional settings.*

(Djelic *et al.*, 2005, pp. 1739-1740)

For this reason attention will be paid in this research to the specific role of editors and publishers. These are the individuals in the comics industry of whom such a linking function can be expected. The information on the individual level also enables us to analyze an organization on more levels: on the organizational level (looking at the organization as one undifferentiated whole), as well as on the level of departments or individuals within one and the same organization.

#### **2.4.4 The values of art and culture for producers**

The remarks made above concern CP research in general. There is a fourth issue, related to co-evolutionary research into the cultural industries. The majority of the publications in this area, with Jones (2001) as a positive exception, hardly pay any attention to the cultural products themselves, and the values attached to them by their producers. In other words: how did the institutional logics change within the organizations, and how this did affect the products? As was already said in the introductory chapter, cultural industries differ from other industries with regard to the tension between artistic and economic values (Lampel *et al.* 2000, p. 263). For a complete insight into the co-evolutionary processes within the cultural industries, information concerning this tension between values is of vital importance.

The dissertation by Huijgens (1999) and the paper by Huijgens *et al.* (2001) based upon the same research provide in many ways a thorough co-evolutionary analysis of the popular music industry. Huijgens (1999) is more ‘all-round’ than the other examples of CP research on cultural industries mentioned in Section 2.3, because it combines findings at the individual firm level with those at the industry level. Nevertheless it lacks attention for the core product of that industry: music itself.

Huijgens develops categories in order to analyze the capabilities-competition co-evolution in the business of popular music. Whereas it is acknowledged that the

smaller record companies, the independents, introduce radical innovations in the music industry (which can be seen as their most important capabilities), of which the most profitable are then exploited by the majors (to compete with others), there is no attention for the motives of these independents for their entrepreneurship, nor for their relationships with musicians or with music itself. Although not made explicit by Huijgens, it is probable that these motives are at least partly the foundation of their explorative search for new musical directions, ways that can only be walked in close collaboration with musicians. Huijgens (1999) sees “music as an outcome of record companies” commercial performance in a business or competitive setting in their attempt to bridge the creative community and the consumer market’ (1999, p. 83). The value of music for the actors is only approached instrumentally. This might be a realistic representation of the strategies of the majors, but I wonder whether this applies to the independents.

Dolfsma’s (1999) dissertation, written from an institutional-economic perspective, is also about institutional evolvments of pop music, but in contrast with Huijgens he stresses the substantial value of pop music for the individuals who are involved. To emphasize the differences between economic and socio-cultural values, Dolfsma uses the word **VALUE** (purposely written in capitals) for the latter category. However, Dolfsma’s study is more about audiences of pop music and the role Dutch radio played in the diffusion of pop music, than about the values of music for their producers: the record companies.

#### **2.4.5 Conclusion**

Summarizing, there are four gaps in co-evolutionary research: the first one is related to the diversity of organizations within a population, the second one to the effect of societal identity on these, the third one to the roles of individuals in evolutionary processes, and the fourth and last one concerns the values of art and culture (culture in the sense of esthetics). Gaps one, two and three concern CP researches in general, the fourth one addresses co-evolutionary research on art organizations and cultural industries. Table 2.1 summarizes the gaps.

OE’s core paradigm focuses on the diversity of organizations, and therefore can help to overcome CP’s first limitation.

**Table 2.1 Gaps in co-evolutionary research**

gap	level of analysis	domain
attention for diversity of organizations in the same population	macro	co-evolutionary research in general
effect of societal identity		
attention for roles of individuals	micro	co-evolutionary research in general
attention for diversity of values for actors (organizations and individuals) in art worlds		co-evolutionary research on art organizations and cultural industries

The most relevant concepts from OE for our purposes are introduced in the next section. Subsequently I will discuss theories and concepts from comparative historical institutionalism, institutional logics and art sociology that can bridge the second, third and fourth gap. There are several overlaps between the approaches of institutional logics and art sociology: in both the roles of institutions and values are important, and both offer methodologies with regard to multi-level analysis, including the societal, the organizational, and the individual level. Art sociology has specialized in the roles and values of art and culture. Theories from the French sociologist Bourdieu and his followers provide a link between both domains.

After that I will develop the theoretical framework for my research, in which all these perspectives are integrated.

## 2.5 ORGANIZATIONAL ECOLOGY

### 2.5.1 Introduction

Organizational ecology (OE) analyzes the dynamics of organizational populations through time. Since the first paper from this perspective was published in 1977 by Hannan and Freeman, many theoretical and empirical contributions refined the knowledge about the composition and diversity of organizational populations.

Although concepts like variation, selection and retention are derived from Darwin's evolution theory, biology was only a starting point for OE research. Concepts from economics (competition) and sociology (legitimacy) were integrated into OE research models in order to explain selection processes within organizational populations.

OE's empirical research often uses databases with information about organizations during a long period of time, sometimes even longer than hundred years. This depends on the birth of the new organizational population and the introduction of the product or service that these organizations deliver, but also on the availability of data. A characteristic of ecological research is that it often uncovers far more organizations than one would expect (Hannan, 2005, p. 52). Other kinds of organizational research concentrate on the larger, better known organizations that have left marks in their population, for example because of the success of their products or business models. In contrast, OE studies dynamics of all organizations within a population, no matter how small they are or how short they were part of the population. A consideration that has led to this choice is that all large organizations have once started as a small one. Organizations that start in the fringe of an organizational field can move to the center of the population in the course of time. Moreover, looking at all organizations in the population contributes to a complete, unbiased analysis of organizational demographics.

It is because of this completeness that the outcomes of OE research show how varied organizational populations can be. At the same time it appears that the dynamics of completely different populations show strong resemblances. In OE analysis organizations are, as far as possible, reduced to those variables that can be used in statistical analyses. Qualitative information is especially used to explain outcomes of analyses or in the preliminary phase of the analysis.

### 2.5.2 Resource partitioning theory

One of the findings of OE is that there are many similarities between differing organizational populations, and that these similarities are more striking than the differences within a population (Hannan, 2005, p. 54). One of these similarities concerns the dynamics of organizational types *within* a population. Although there are many ways to develop typologies of organizations within a population, OE re-

search especially uses the division between generalists and specialists, because this is closely related to the niche width that defines an organization's range. Wezel and Van Witteloostuijn (2003) define the two types as follows: "generalists target the market's centre only, whereas the specialist operates in a single niche in the market's periphery" (2003, p. 9). A third category is that of the polymorphist organization. This is a hybrid between generalist and specialist organizations, offering products in both the market centre and the periphery (2003, p. 9).

Resource partitioning theory, developed within the OE perspective, uses this typology of generalists, specialists and polymorphists to explain general demographic processes (density, entry - the 'birth' of an organization or of its presence in a niche, and exit - the 'death' of an organization or its departure from the niche) and the effect of legitimation, competition and concentration within a population's niche. It focuses on the ways in which the differing types of organizations divide the available resources in their niche and thus succeed in surviving. Carroll (1985) found out that increased concentration among generalists had a positive effect on foundations of specialists, and that specialists were more active in the creation of innovations. Resource partitioning theory has been applied by researchers in many industrial contexts, and at least once in the cultural industries: Mezias and Mezias (2000) used the resource partitioning theory to analyze the contribution of both generalists and specialists to innovations in the American film industry in 1912-1929. They confirmed Carroll's findings: specialized firms got more opportunities after the movie industry became more concentrated, and especially these young, small firms created new movie genres.

### **2.5.3 Industrial Organization and OE**

A second division of organizational types is derived from another theoretical field, that of Industrial Organization (IO). Boone and Van Witteloostuijn (1995) seek for cross-fertilization between OE with IO and strategic management. Just like Oliver (1997) they suggest that adding a focus on differences between and within organizations would enrich ecology's attention for organizational similarities. The combination of strategic management with OE would help understand variation-increasing and variation-reduction mechanisms on the one hand, and selection processes on the other hand. IO focuses on the differences between populations of organizations, which is expressed in the level of market concentration, and in a typo-

logy of industries with endogenous or exogenous sunk costs (Boone and Van Witteloostuijn, 1995, p. 278). This dual typology shows similarities with OE's distinction between generalists and specialists.

Boone and Van Witteloostuijn quote Sutton (1991), when they describe the distinction between two main types of industries that has been made within IO. 'Type I' industries, as they are prosaically referred to, are characterized by exogenous sunk costs, whereas 'Type II' industries can be recognized by endogenous sunk costs. In Type I industries all organizations have to make the same kinds of high investments before they start their business and these are fixed in the short run. One cannot enter this industry without making these costs.

In Type II industries an organization can choose for itself how many costs it makes. Sutton limits his resumé of these costs to R&D efforts, that can be necessary in order to differentiate products, and to advertising, that can help to convince consumers to pay for these products (Boone and Van Witteloostuijn, 2004, p. 705). In general the investments before production in Type II industries are not as big as those of Type I. Industries with endogenous sunk costs are driven by economies of scope, whereas those with exogenous sunk costs depend on scale advantages (2004, p. 705). However, in many industries scope and scale economies co-exist (2004, p. 716).

Boone and Van Witteloostuijn (2004, p. 716) classify industrial contexts in resource partitioning studies by using the combination of OE's and IO's concepts. The classification exists of industries where scale economies dominate, industries where scope economies dominate, and industries where scale and scope economies are mixed. This latter category is characterized by multi-product generalists and differentiated specialists. The newspaper industry belongs to this category, and possibly the comics publishers would also fit in here. Although the authors do not explicitly pay attention to this, it can also be the case that an industry develops from one category into another, depending on the prevalence of economies of scope or scale. Such an evolution has consequences for competition processes, and therefore also for the strategies of individual organizations within that niche.

Van Witteloostuijn and Boone (2006) make use of the same combination of insights from OE and IO to form a resource-based theory of market structure and organizational form. They discern three ideal-type resource spaces (2006, p. 414), of which the so-called tailed resource space features a 'relatively resource-abund-

ant center of similar or related resources, surrounded by tails of dissimilar and relatively scarcer resources' (2006, p. 414).

The American beer brewing industry is an example: it has a large center of buyers of mass-produced beer, and 'tails' that exist of consumers of specialty beers. The comics industry at the end of the 20<sup>th</sup> century seems to fit in this ideal type. Depending on the dominance of scope or scale, the generalists sell just a single product or multiple products. In both cases the specialists are just selling a single product (2006, p. 421).

If we apply this to the comics industry, the products of generalists are albums and magazines (multiple products), and those of specialists are comic albums (single product). Industries with these tailed resource spaces can have four differing market structures: a concentrated structure, in which only generalists are active, a dual market structure, that has room for a small number of generalists and a large number of specialists, a uniform structure, that only has room for small multiproduct generalists, and finally a fragmented structure, that includes small single product generalists and specialists (2006, p. 423). We will try to find out whether in the comics industry there is a development from one market structure to another. We expect that the post-war comics industries have developed from a concentrated structure to a dual structure and at the end of the 20<sup>th</sup> century are more close to a fragmented structure. In Chapter 5 we will test this proposition.

#### **2.5.4 Organizational form and niche identity**

Another stream within OE research focuses on organizational form and niche identity. Identity-oriented OE research introduced the differentiation between *de novo* and *de alio* organizations as one of the dimensions of a niche's identity: the first category concerns organizations that are founded with the purpose to function within a niche, whereas the latter concerns organizations that have their origins in another niche. Only if a new product gets more diffused, and reaches a certain state of legitimacy, the number of *de novo* organizations in the new niche begins to rise.

The activities of large, well-known *de alio* companies in the new niche can be a condition for legitimacy of that new product, and thus for the entry of more *de novo* companies (McKendrick and Carroll, 2001). On the other hand, if in the



course of time the de alio organizations continue to dominate the de novo organizations in the new niche, this can have negative implications for the legitimacy of the new niche: it will remain associated with de alio organizations and with the niches that they were specialized in. As a consequence the new niche will not come into full life, and will not develop as a field with its own identity (McKendrick and Carroll, 2001). The sharpness of the niche's identity depends on the share of de novo and de alio organizations within a niche (Hsu and Hannan, 2005).

A relatively recent development within OE is the attention for the relationship between organizational identities, forms and genres (see among others Hsu and Hannan, 2005, and Hsu *et al.*, 2009). An important element in this research is the role of audiences in establishing or changing the forms and identities of organizations. Audiences are defined as 'collections of agents with an interest in a domain and control over material and symbolic resources that affect the success and failure of the claimants in the domain' (Hsu and Hannan, 2005, p. 476).

This stream of research is more than most other OE research closely linked to research on cultural industries: the concept genre is derived from films, and based on DiMaggio's (1987) paper about the social construction of artistic classification systems. The relevance of audiences is illustrated by e.g. Hsu and Hannan by explaining the importance of critics and experts from art worlds in establishing or changing the identity of an art organization. This reveals the relationship between Hsu's interpretation of audiences with the institutional approach to art and the importance of symbolic capital, as formulated by the (art) sociologists Becker (1982) and Bourdieu (1980, 1993).

In another paper Hsu *et al.* (2009) integrate the roles of audiences and producers in dealing with products that span multiple categories. As an example they refer to films that belong to more than one genre (e.g. a science fiction western like 'Wild Wild West'), and the negative consequences of this 'fuzziness' for its success. According to the authors this also means that organizations that produce multiple category products are less successful than organizations that produce single category products. They consider this to be a starting point for further development of ecology of the overall audience, which in turn would 'set the stage for the formal treatment of the co-evolution [stress by me - RdV] of populations of producers and audiences' (2009, p. 167).

Their attention for products that belong to multiple categories fits with the object of this study: comics. Comics are a multiple category or hybrid product in more than one way: as a medium they are a combination of narrative and images, but as a product they are often seen (by audiences but sometimes also by publishers themselves) as a mixture of a book and a magazine. In addition they are often perceived as products for children, even if their content is far from childish and producers try to market them for adults. Finally, traditionally comics were a mass medium, and by many audiences are still seen as such, although innovative, alternative comics and graphic novels are in fact niche products with artistic qualities (Beaty, 2007), comparable to that of other literary and art books (poetry, autobiographies, artists books).

To summarize, two concepts introduced by Hsu and Hannan (2005) and by Hsu *et al.* (2009) appear to be quite useful for research into the co-evolutions of comics, its producers and environmental factors:

*firstly*

1. the relationship between organizational identity,
2. organizational form, products (and their genres), and
3. audiences;

*secondly*

4. the relationship between the multiple category membership of a product or genre,
5. its consequences for the perception and reception by audiences, and
6. also for the producers themselves.

How these concepts can be integrated within a co-evolutionary framework will be shown in Section 2.7.

Hsu *et al.* focus their research on populations. They do not suggest opening the ‘black boxes’ in the ecologies of producers and audiences, nor do they attach value to contextual, qualitative information as a part of the analysis itself. Instead they prefer a ‘formal’ treatment. With this they mean the objective, quantitative methods that traditionally form the ecologists’ methodological toolbox. I do think it is a step forward in OE research to pay attention to audiences, but I still miss the inside of the black box, i.e. the qualitative, interpretive part of the analysis, with attention for findings on the micro level of single organizations and individuals within these

organizations and their audiences. This kind of information is also necessary to bridge the third and fourth limitation of CP research, as summarized in Section 2.4. The next section is dedicated to theories that will be used for this purpose.

## **2.6 COMPARATIVE HISTORICAL INSTITUTIONALISM**

### **2.6.1 Introduction**

In the institutional theories mentioned earlier, the role of time in institutional processes is not often made explicit. It does play a fundamental role in a research stream classified by Hotho (2009) as comparative historical institutionalism (CHI). Two approaches that belong to this variant of institutionalism are relevant for this research: societal analysis and the national business systems theory.

### **2.6.2 Societal effect**

Research on the effect of society of the developments of organizations is based on the idea that social, economic and political institutions develop reciprocally over the years, and that this historical interrelatedness leads to a societal identity (Maurice and Sorge 2000). This identity is different for each country. It can change, for instance as a consequence of internationalization, but the outcomes of these changes will be different in each country, depending on its already established identity. Societal analysis is useful for comparisons between countries, because it takes into account all the possible factors that influence convergent and divergent processes of management and organization.

Whitley's (1999) perspective of national business systems compares national institutions between countries. Research in this tradition contains cross-societal studies, in which differences between business recipes are examined on a worldwide level. Even within Europe there are differences between these systems, let alone between the continents. Whitley discerns four institutional dimensions that lead to a specific form of market economy: 'the state, the financial system, the skill development and control system, and dominant conventions governing trust and authority relations'

(1999, p. 47). Six business systems have been labeled, after applying three groups of variables:

1. the nature of ownership relations,
2. inter-firm connections, and
3. employment relations.

Although these are ideal types, many countries fit in one or a combination of two business systems. According to Whitley (2000, p. 859) the Netherlands for instance are a hybrid between the compartmentalized business system, which is dominated by Anglo-Saxon countries, and the collaborative system, that is dominated by Northern European and Scandinavian countries (where the 'Rhineland model' prevails).

Methodologically, societal analysis and national business systems research have a qualitative, theory-constructing character. According to Noorderhaven (2000) the strength of the theories is that they can offer a critical reflection on positivist research that looks for universal laws. By acknowledging an explicit hermeneutical methodology this research can contribute to a deeper understanding of the societal effects on organizations than is possible by positivist research.

However, especially the typology of business systems that is one of the results of Whitley's research offers a challenge to positivist researchers. According to Hotho (2009) Whitley's qualitative, theory constructing research could be tested by introducing a (quantitative) indicator of institutional distance that builds on his thoughts. This would be an improvement, because a lack thereof 'is a major omission of IB literature, given the central role of substantive country differences in our understanding of international business' (2009, p. 40).

Hotho succeeds in relating Whitley's (1999) key institutional features to indicators from the *Global Competitiveness Report* (the edition of 2000, published by the World Economic Forum). After an extensive analysis he discovers six clusters of countries and is able to test Whitley's theories. The clusters show many similarities to Whitley's business systems. Whereas Whitley is reluctant to mention actual countries for each of his business system types, because these are ideal types, Hotho mentions all countries that belong to each cluster. This is logical, because it was the result of his cluster analysis.

The analysis leads to a new business system type: a cluster that has similarities with the Anglo-Saxon compartmentalized system and with the collaborative system, but nevertheless forms a cluster of its own.

The Netherlands are one of the countries that belong to this cluster, together with other Northern-European countries. With this finding Hotho not only confirms Whitley's statement mentioned above about the hybrid system of (among others) the Netherlands, but also improves the latter's typology.

Hotho's second contribution is his development of a measure for comparative institutional distance by using the same data. He uses a formula comparable with the one Kogut and Singh (1988) created for their measure of cultural distance on the basis of Hofstede's (1980) cultural dimensions. The measure provides a quantitative tool that can be used for further testing and improving Whitley's concepts and those from societal analysis, but that can also help to forecast or explain differences between countries with regard to internationalization processes. In his research Hotho used this measure and other variables to find out which factors were most important for foreign direct investment. He found out that institutional distance did not have such an important role as other factors, like historical ties.

Although Hotho's conclusions appear to be very plausible, measures like the one he developed can be risky. Limiting institutional differences between countries to a single measure is a property of the positivist research that Noorderhaven (see above) was critical about. Such measures will obviously lead to the same criticism that Hofstede's indices (derived from his cultural dimensions) were exposed to: to be reductionist. Although in the empirical cycle Hotho's deductive research is a logical, next step in the development of CHI, it is also removed very far from the open, interpretative methodology of societal analysis.

#### **2.6.4 Conclusion**

Qualitative and quantitative findings from CHI can help explaining why there are limits to the convergence of organizations in different countries under the influence of globalization: all companies are embedded in a larger, societal context (Whitley and Kristensen, 1996).

Knowledge about societal identities and business systems helps to fill the second gap of CP research. Because the aggregation level of research from this stream is high (it deals with all companies in a country), one should be careful to apply the concepts to dynamics within just a single industry - as is the case in this research.

## **2.7 INSTITUTIONAL LOGICS AND ART SOCIOLOGY: ATTENTION FOR THE ROLE OF THE INDIVIDUAL, FOR VALUES, AND FOR ART**

### **2.7.1 Institutional logics**

The perspective of institutional logics provides a link between the institutional approach, strategy and organizational change. It describes the “contradictory practices and beliefs inherent in the institutions of modern western societies” (Thornton and Ocasio, 2008, p. 101), and throws light upon the evolutions of values within organizations.

Fligstein (1990) shows how the institutional logics or strategies of large corporations go through several stages in the course of time, in which the attention shifts from the product to sales and finally to a financial conception, no longer related to a specific industry.

Thornton (2004) provides a case study of higher education publishing conglomerates. The impact of institutional logics in these organizations is so strong that they lead to eye-blindness in decision making. Executives caught in these logics are simply not able any more to do this in the way their precursors would have done, even if in specific situations this would be the more rational thing to do. Thornton combines quantitative research of populations of publishers during a longer period, with qualitative information on the individual level, derived from interviews and articles. By using this combination of micro- and macro-level data she is able to analyze the nature of the changes of logics and its consequences in detail. She discerns two ideal types of logics: editorial logics, with attention for books and networking with authors, and market logics, with attention for the market of companies (to acquire or to merge with). Thornton’s findings are comparable with those of Fligstein, when she shows that the logics of educational publishers have shifted from attention for their products to financial motives. The

Table 2.2 Boltanski and Thévenot's common worlds

	inspired	domestic	civic	opinion	market	industrial
mode of evaluation (worth)	grace, nonconformity, creativeness	esteem, reputation	collective interest	renown	price	productivity, efficiency
format of relevant information	emotional	oral, exemplary, anecdotal	formal, official	semiotic	monetary	measurable: criteria, statistics
elementary relation	passion	trust	solidarity	recognition	exchange	functional link
human qualification	creativity, ingenuity	authority	equality	celebrity	desire, purchasing power	professional competency, expertise

source: Boltanski and Thévenot 1999, p. 368

explanatory note: Boltanski and Thévenot have given the same table a different name: 'Orders of worth' (1999, p. 368).

logics that Thornton and Fligstein write about are closely related to values within organizations.

Whereas Thornton combines individual data concerning these values with those at a macro level, Boltanski and Thévenot (1999, 2006) are mainly interested in values at the individual level. They illustrate how values may vary, depending on the context in which they are negotiated. The same person, as a representative of an organization, can disseminate differing value-regimes in a strategic way, and thus enhance his chances of success.

These value-regimes are derived from what Boltanski and Thévenot (1999) call ‘common worlds’: social spaces that share modes of justification. Based on a combination of empirical data, classical texts from political philosophy, and practical handbooks for companies, the authors construct six different common worlds, but as a caveat they add: ‘this number is not, of course, a magical one. These worlds are historical constructions and some of them are less and less able to ground people’s justifications whereas other ones are emerging’ (1999, p. 369). Table 2.2 shows these common worlds and their dimensions.

The inspired world can be related to artistic and cultural values. At the opposite end the market and industrial world can be related to commercial values. In my opinion the differences between the latter two worlds are relatively small, especially if applied to an industry like the comics publishers. For my purposes I will interpret the values of these market and industrial worlds as belonging to one and the same common world: that of a commercial firm.

Glynn and Lounsbury (2005) use comparable concepts at an organizational level. They try to find out to what extent a mixture of values used by a symphony orchestra influences critics in their reviews of concerts. Lounsbury and Glynn limit their differentiation of logics to esthetic and market logics; a division that is comparable to Boltanski and Thévenot’s inspired and market value regimes.

### 2.7.2 Art sociology

Boltanski, mentioned above, is a student of Pierre Bourdieu. The latter’s publications about organizational fields can be seen as the European counterpart of Di-



Maggio and Powell's (1983) neo-institutional studies. The main difference is that neo-institutionalism is mainly known for its focus on isomorphism: the tendency of convergence within institutionalized organizational fields, whereas Bourdieu suggests a continuous struggle for hegemony between institutions within a field. In this respect he can also be seen as one of the precursors of institutional logics.

Bourdieu wrote on many societal topics, but because of his publications about arts (a.o. Bourdieu, 1980, 1983, 1993, 1996) he belongs to the most influential sociologists who wrote on the institutional side of the arts, together with Howard Becker (1982) and Paul DiMaggio (1987, 1991). Bourdieu mainly sees art as a social construction. According to him art derives its value from social processes, and is used as cultural capital. People from the same social classes exhibit the same taste, thus showing to others in that class that they belong to them. At the same time their disposition towards art is (unconsciously) used as an instrument to distinguish themselves from other classes.

It is logical that sociologists like Bourdieu theorize at a societal level, even if they have been collecting data at an individual level. However, art and culture can only affect society if they also influence people at an individual level. Not only are the most influential artists talented individuals, but they and their creations can have such an impact on other individuals, that these may decide to dedicate their lives or careers to this art.

This value of art is called *singularity* by the French sociologist Heinich (1996). Heinich's ideas can be seen as a reaction to Bourdieu, of whom she is a student (just like Boltanski). Heinich thinks that his (and other institutionalists) views on art are reductionist, and neglect the variety of values that art can have for individuals. She returns to the exceptional, unique, sometimes even 'abnormal' (Heinich, 2002, p. 201) role that art can play in an individual's life. Heinich's research concerns traditional forms of high art (literature, paintings, classical music), and does not cover the possible singularity of films, pop music or comic books. In contrast to Bourdieu she thinks that art is more than the outcome of a social process. In her perspective the interaction between the individual and the artwork is of crucial importance if one wants to understand the impact of art.

The idea that an object, in this case a work of art, can have an enormous impact on individuals is derived from the science philosopher Latour (1988). In his Actor Network Theory (ANT), human actors and non-human actants (objects) are of

equal importance in sense-creating processes. The importance of objects or products has already been acknowledged in co-evolutionary research. Murmann (2003) provides an example with his seminal study about co-evolutionary processes in the 19<sup>th</sup> century dye industry: the dye-products co-evolve with institutions (governments and universities) and firms. However, in his case the human actors are not artists or artlovers, but chemists. The close interaction between materials and chemists would certainly be confirmed by Latour, but I doubt whether Heinich would attach the label *singularity* to this.

Nevertheless paying attention to the extraordinary meaning that an art form can have for an individual is important to get a better understanding of the choices actors in the cultural industries make, including comics publishers. The singularity that art and artists have for the *connaissanceur*, is not so different from the passion that a fan of films, tv series, pop music or comics has for his medium and the artists behind it. The fact that Heinich does not make this comparison might be related to the lower level of legitimacy of popular culture: fans ('fanatics') are neglected or looked down upon by the elite that embrace art. This condescension towards mechanically reproduced objects that are not accepted as art is also an effect of singularity: it implies a hierarchy of the artistic and contempt for everything that is on the lower end of this hierarchy (Gielen, 2005, p. 794-795). Paradoxically condescension by representatives of the traditional art world is even treasured by some fans of popular culture, who despise becoming a part of the 'official' culture (Brunsmann, 1998, Lopes, 2006).

The singularity of pop music, films or comics can lead to a lifelong dedication, just as in the case of painting. The singularity of comics can affect people when, as a consequence of their love for comics, they choose to dedicate their career to it. They start drawing comics, collect them, write about them, and begin a comics shop, a comics festival or a publishing company.

Not only can certain dimensions of fandom from popular culture be compared with the passion for traditional art, but products from the cultural industries can also be seen as art. Literary novels, generally accepted as a major form of art, are in fact a product of the cultural industries, because they are printed and copied mechanically. The idea that comics (or at least some forms of comics) can be seen as a form of art, is relatively recent, and will still cause the occasional frowning. Sociologists like Becker and Bourdieu have contributed to a broader view on art, because they showed that what is art and what is not depends on criteria that are by definition

socially created. Art is not art because of some intrinsic value: it only gets this value after it has been labeled as such by people who are in the position to do so.

This implies that a cultural utterance that once was seen as 'low culture' can develop itself into 'high art'. According to Becker (1982) this is only possible if an 'art world' comes into existence, with networks of producers, distributors and audiences. Among the producers there should be a differentiation between market-oriented and artist-oriented organizations. Critics and experts play an important role in classifying the products and producers within an art world. Becker explains how these social processes led to the acceptance of photography as a form of art. In terms of Bourdieu the market and artist-oriented organizations are working according to heteronomous versus autonomous principles. For legitimacy at a societal level symbolic capital is necessary, which can be provided by critics who work for high brow newspapers and journals, by attention from academics, and by support from the government.

Lopes (2002) uses Becker's concepts to explain the evolution of the legitimacy of American jazz music: once seen as harmful and trivial (just like rock and roll music in the 1950s), but nowadays acknowledged as a true American form of art. The evolution of comics towards a form of art has also been studied by sociologists. Boltanski (1975) analyzes the ambitions of a young generation of French comics artists in the 1970s whom tried to gain recognition as artists and distance themselves from their predecessors. They mainly saw themselves as craftsmen. Brunsmann (1998) describes a comparable struggle between craftsmanship and artistic conventions in the late 20<sup>th</sup> century Dutch comics world. Lopes (2006) describes the same processes in the United States and shows how the ambitions of comics artists and others active in the comics world were constrained during a long time by stigmas put on comics in the middle of the 20<sup>th</sup> century.

The evolution of ideas on what is art and what not, goes hand in hand with the evolution of art and popular culture itself. There is an enormous differentiation within the supply of pop music, films or comic books, and there are utterances that can be regarded as art, because of their innovativeness, authenticity or depth, even if these art forms are less institutionalized than traditional 'high arts' (Laermans, 1993). This makes it plausible that fans of comics by for example Marten Toonder, the 'godfather' of Dutch comics, can be touched by their singularity. Their situation is comparable with individuals who adore paintings by Van Gogh - a subject of one of the studies by Heinich (see Heinich, 1996).

Gielen (2005) combines Boltanski and Thévenot's value regimes with Heinich's concept of singularity and elaborates on them in a case study about artistic leaders of traditional arts organizations. Daigle and Rouleau (2010) apply Boltanski and Thévenot's concepts on strategic plans by arts organizations. In both cases it appears that Boltanski and Thévenot have provided useful constructs: the use of a specific value regime depends on the context, and values can be used strategically by art organizations. The value regimes of an art organization are certainly not limited to inspired logics. The cause can be exogenous, as was shown by Glynn and Lounsbury (2005) in their paper about the use of esthetic and market logics by a symphony orchestra (already introduced in the previous section).

However, not so much is known yet about the value regimes in cultural industries. Are they dominated by market/industrial logics or a mixture of these with inspired/esthetic logics? For my purposes it is especially interesting to find out whether there are differences between and within comics publishers with regard to the dominance of value regimes from the inspired world and the market/industrial world, and to see whether there are shifts between these values in the course of time.

### 2.7.3 Conclusion

Summarizing, for the analysis of comics publishers at the micro level concepts will be used from art sociology and institutional logics. Heinich's singularity adds information at the individual level with regard to the values of culture. Individuals who have been affected by the singularity of comics, and who as a consequence have chosen to dedicate their career to it, do not necessarily express that passion continuously, in all kinds of social settings, nor is this value the only important one for them. Moreover, these values can change. This is where institutional logics come in. Fligstein's and Thornton's interpretation of institutional logics, and Boltanski and Thévenot's value regimes will be useful for my research model for two reasons: firstly they offer a theoretical foundation for paying attention to the differences and similarities between the logics at the organizational level and the values of individuals within these organizations, and secondly they provide the opportunity to discern between different kinds of values, including esthetic values, and the uses thereof. By integrating the concepts of value and singularity from

institutional logics and art sociology into CP models, the third and fourth limitation of CP research can be bridged theoretically.

## **2.8 TOWARDS A THEORETICAL FRAMEWORK**

### **2.8.1 Introduction**

After having introduced CP, OE, CHI, institutional logics, art sociology and concepts from other relevant organizational research in the previous sections, I will now integrate these concepts within a CP framework, and explain why and how this has been done.

### **2.8.2 CP and OE compared**

CP originates from the paradigm that selection processes within organizational populations and adaptation strategies of individual firms cannot be seen in isolation from each other, because they are interrelated. By combining analyses at the macro level and the micro level, one gets more insight into the interdependence of developments within organizational fields with managerial choices of individual organizations. OE mainly studies developments of complete populations of organizations (macro level), and uses a steadily growing array of concepts to explain demographic dynamics within these populations.

The main similarity between both streams is that they study whole populations of organizations during long periods. An important difference is that OE uses a quantitative methodology, whereas CP combines quantitative and qualitative, interpretative methods. OE has become a major paradigmatic approach within the area of organization science. CP has also gained influence, although it was developed more recently. With regard to methodology and conceptual frameworks CP researchers do not form such a clearly recognizable group as OE scholars. Even papers in CP-special issues of journals only partly fulfill the many conditions for

co-evolutionary research, although they were selected for publication by the same people who created these conditions.<sup>1</sup>

Although there are similarities between OE and CP, they hardly make use of each other's concepts in their respective research programs. This is a pity, because combinations of concepts derived from both perspectives could contribute to a richer understanding of organizational dynamics. The strong point of the co-evolutionary perspective is that it contradicts the idea that research should be based on either a subjectivist or an objectivist epistemology. Objectivists look at dynamics within populations of organizations as natural processes, whereas subjectivists, who often study individual firms, stress managerial intentionality. In the latter case, idiosyncrasy of firms gets more attention than natural laws that can be applied to all organizational populations. However, as McKelvey states:

*(...) the continuation of the paradigm war between objectivism and subjectivism construes the problem as an 'either-or' choice between objective/natural and subjective/intentional phenomena, when in fact the most interesting aspect of organizations is the continual transition between the two phenomena (...).*

(McKelvey, 1997, p. 374)

He sees CP as a research direction within organization science that could bridge the paradigmatic conflict between what he calls positivist, objective theories (like OE), and post-positivist, subjective theories. McKelvey suggests that the 'natural' (positivist, objective) side of CP should be developed more, in order to get a better grip on phenomena between intentionally (e.g. strategy) and naturally (selection processes) caused processes within organizations (1997, p. 374). Lewin and Koza (2001, p. X) are more specific. They state that co-evolutionary studies could make progress by triangulating contextual, qualitative information, with event-history analyses, which were hardly present in CP research at the time their paper was published.

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<sup>1</sup> This is illustrated by the 'Guest Editors' Introduction' to a special issue of the *Journal of Management Studies* dedicated to the co-evolutionary perspective (Volberda and Lewin, 2003). After they have introduced the papers (that they have selected) the editors state: 'Of course, these papers only partially satisfy the requirements of co-evolutionary empirical research' (2003, p. 2130).

Event-history methods are often applied in OE. Just as in CP, OE uses contextual information about (historical) developments within a niche, but whereas in the case of CP the interpretation of these (qualitative) data are a crucial part of the analysis itself, in OE it mainly serves as background information needed to formulate hypotheses, design models, and collect suitable, quantifiable data, that are translated into variables and analyzed statistically. OE research typically belongs to the ‘natural’ stream of organizational research: according to OE researchers, formal analysis of empirical data by using formulas and statistical methods renders an objective view of dynamics within organizational populations.

### 2.8.3 Integration in one model of CP, OE, institutional logics and art sociology

As we saw in the previous section OE has introduced many theories and concepts that give us insight into the diversity of organizations, and that explain their demographics. The typologies generalist, specialist and polymorphist from resource partitioning theory as well as the industry types I and II, taken from IO, offer us instruments that allow us to be more detailed in describing the co-evolutions within the comics industries, than would be the case if we only used CP models. It is likely that not all organizations within an industry develop into the same direction, and with these typologies we can differentiate within the otherwise amorphous industry.

The knowledge collected by OE scholars about the shaping of organizational and niche’s identities are also relevant for our purposes, and not present in CP research. This includes the effects of the ratio between de alio and de novo organizations on the legitimacy of a niche, the dynamics in this ratio, and the role of audiences in shaping organizational and niche’s identities. The dimensions of the audiences and of the genres that (multiple category) products belong to are not a part of CP, and a welcome addition. The programmatic proposals made by Hsu *et al.* (2009) in this direction fit the properties of comics industries and also point to a co-evolutionary direction, as appears from the quote from Hsu *et al.* in Subsection 2.5.4. In this respect OE seems to answer the request by Lewin and Koza (see above).

In line with Lewin and Koza I will use OE’s event history methods where possible and relevant, but I will do this in an overarching co-evolutionary context. For event

history methods that include statistical analyses, data are needed at the macro level, e.g. concerning variables that refer to the categories of organizations within niches from resource partitioning theory.

In my research this addition of OE concepts to the CP model will not lead to less attention for (subjective) case studies and qualitative information at the micro level of the individual firm. As McKelvey wrote, exactly this transitional area is the most interesting part of organization studies. But whereas he only pleads for more attention to CP's 'natural' (objectivist) side, I am strongly in favor of adding more depth to the 'intentional' (subjectivist) side of CP. This part of CP research can be strengthened by paying attention to information at the individual level and by using concepts from institutional logics and art sociology.

In general information from individuals can be relevant, if they are important spokesmen from firms in the niche, able to provide information that can be used in triangulation with research of written accounts and event history analysis. In this study it is possible to collect such information, because the research includes the decades just behind us, and not only concerns earlier periods (like Jones, 2001 and Murmann, 2003). Many individuals active in the comics industries in the past forty, fifty years are still alive. This information at the micro level will include the value regimes within the firms, including the values attached to the artistic product and its singularity.

Hsu's attention for the relationship between audiences, products (genres) and producing organizations provides a useful concept for qualitative studies as well. In fact it has partly been derived from interpretive research from sociologists like Becker (1982) and DiMaggio (1987). These concepts can be used in other paradigmatic areas than just that of OE itself. If applied in CP frameworks, they will contribute to making it the 'quasi-natural' organization science that McKelvey wishes it to be.

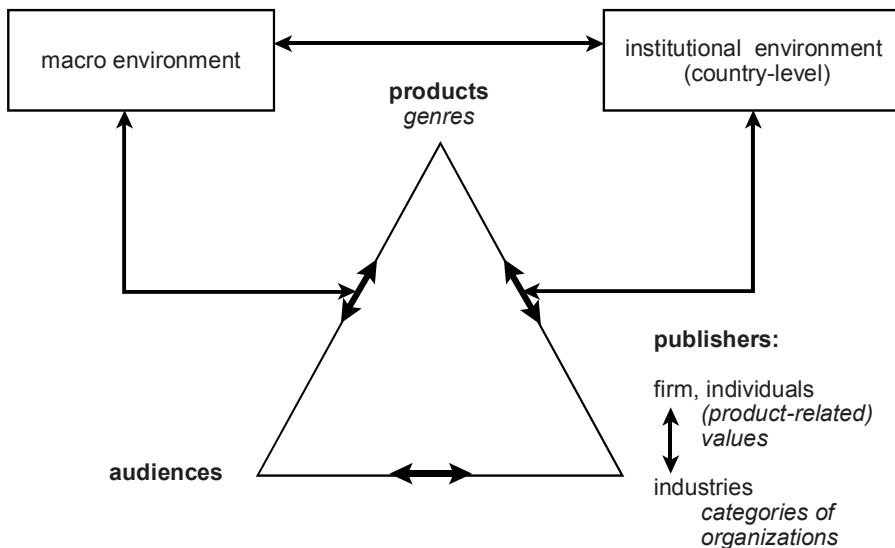
These additions to the original CP framework make it more 'extreme', in the literal sense that both extreme ends of the CP approach (subjectivist and objectivist) are enriched with more dimensions, thereby bridging the limitations of earlier CP research. More information on the macro level is provided, as well as on the micro level. A metaphor for this framework that can be useful is that of multi- or vari-focal glasses that are used by people who are short sighted and far sighted at the same time. Therefore I will refer to this model as the 'Vari-focal model'. Alter-



native, but more prosaic names could be ‘extended co-evolutionary model’ or ‘extreme co-evolutionary model’.

Figure 2.1<sup>1</sup> presents this model in which the concepts from CP, OE, institutional logics and art sociology have been integrated. Table 2.3a and Table 2.3b provide an overview of the concepts, the gaps in co-evolutionary research that they bridge, the theoretical streams in which they have their origins and the numbers of the chapters in this book where they will be dealt with.

**Figure 2.1 Conceptual framework: the Vari-focal model**



The double-sided arrows represent the co-evolutions between actors, factors and actants, the products: in our case comics. The term actant is derived from Latour (1988; see Subsection 2.7.2), and refers to the ‘active’ role that objects play in their relationship with human actors. The central triangle is based on the proposal by Hsu and Hannan (2005), and partially overlaps with the co-evolutionary relation

<sup>1</sup> Elements from earlier co-evolutionary models (Lewin *et al.*, 1999, p. 537; Lewin and Koza, 2001, p. VII; Hsu and Hannan, 2005; Hsu *et al.*, 2009) are integrated in het framework with concepts from institutional logics and art sociology.

Table 2.3a Overview of concepts that bridge the gaps in co-evolutionary research

gap	concepts to bridge the gap	theories and scientific domains that the concepts are derived from (and names of authors)	empirical chapter(s) in this book
Attention for diversity of organizations in the same population.	<ul style="list-style-type: none"><li>- Demographic developments of organizations: entry, exit, density dependence, density delay, half life, mortality hazard, product portfolio width.</li></ul>	Organizational ecology (Hannan and Freeman 1977, 1984; Carroll and Hannan 1989; Boone and Van Witteloostuijn 1995; Hannan 2005; Wezel and Van Witteloostuijn 2006).	5, 6, 7
	<ul style="list-style-type: none"><li>- Specialist, generalist, polymorphist;</li><li>- Resource spaces, market structures.</li></ul>	Resource partitioning theory (Carroll, 1985; Carroll and Swaminathan, 2000; Van Witteloostuijn and Boone, 2006).	
	<ul style="list-style-type: none"><li>- De alio and de novo;</li><li>- Multiple category membership of product or genre.</li></ul>	Niche identity (McKendrick and Carroll, 2001; McKendrick <i>et al.</i> 2003; Hannan, 2005; Hsu and Hannan, 2005; <i>Hsu et al.</i> , 2009).	
	<ul style="list-style-type: none"><li>- Type I and Type II industries</li><li>- Market concentration</li></ul>	Industrial organization (Sutton, 1991; Boone and Van Witteloostuijn, 1995, 2004).	

Table 2.3b Overview of concepts that bridge the gaps in co-evolutionary research

gap	concepts to bridge the gap	theories and scientific domains that the concepts are derived from (and names of authors)	empirical chapter(s) in this book
Effect of societal identity.	<ul style="list-style-type: none"><li>- Societal effect;</li><li>- National Business Systems;</li><li>- Institutional distance.</li></ul>	Comparative historical institutionalism (Whitley, 1999, 2000; Maurice and Sorge, 2000; Hotho, 2009).	6, 7
Attention for roles of individuals.  Attention for diversity of values for actors (organizations and individuals) in art worlds.	<ul style="list-style-type: none"><li>- Singularity</li></ul>	Art sociology (Heinich, 1996, 2002).	6, 7
	<ul style="list-style-type: none"><li>- Market-oriented and artist-oriented organizations.</li></ul>	Art sociology: field theory (Bourdieu 1980, 1993), art worlds (Becker 1982). Institutional logics (Glynn and Lounsbury 2005).	
	<ul style="list-style-type: none"><li>- Value regimes; editorial, inspired, industrial and market logics.</li></ul>	Institutional logics (Fligstein, 1990; Thornton, 2004; Thornton and Ocasio, 2008). Common worlds' theory (Boltanski and Thévenot 1999, 2006).	

between products and producers that was already part of the CP model. Producers are in our case the publishers of comics, and the products are comics.

The core of earlier CP research concerns the co-evolutions between producers: the firm and the industry that this firm belongs to. These are found at the lower right-hand side of the triangle. The individual level is added to the firm level. The audiences in the lower left-hand side of the triangle are those actors that actively influence products and producers. To repeat Hsu and Hannan's (2005, p. 476) definition of audiences, these are 'collections of agents with an interest in a domain and control over material and symbolic resources that affect the success and failure of the claimants in the domain'.

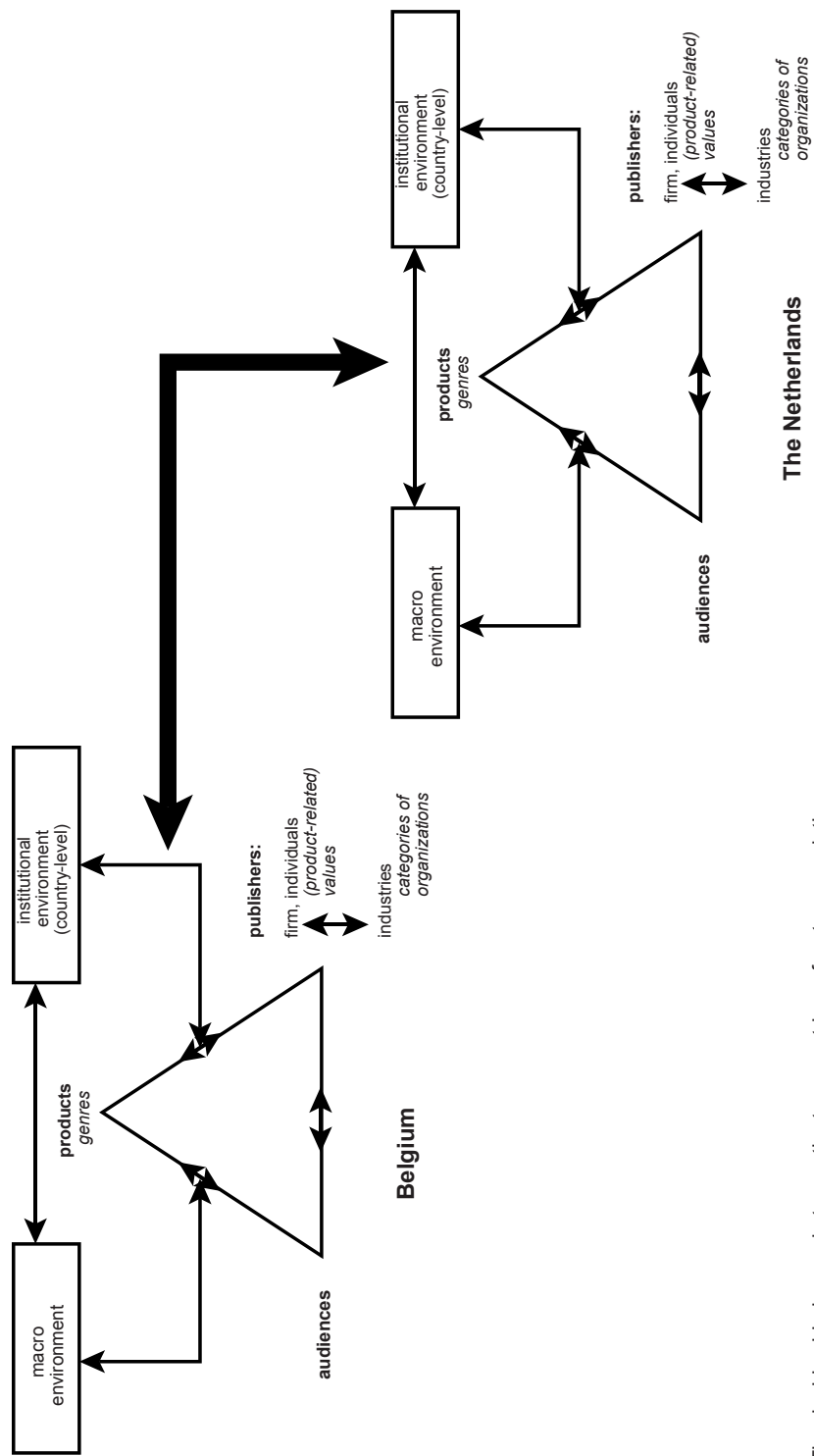
In the case of the comics industries I will interpret audiences as artists, fans (dedicated consumers), critics, media, and distributors of comics (distributing organizations, bookstores, and specialized comics shops). The balloons at the upper left- and upper right-hand side of the triangle represent respectively general environmental factors (social-cultural, economic, demographic, and technological) and institutions that operate at a country level (government, educational institutions, overarching organizations of publishers and booksellers).

Dimensions of actants and actors are rendered in *italic*. The first one is Hsu's concept of *genres*, which is added to the actant products, in order to differentiate between comics. The second one concerns the *categories of organizations* from OE and resource partitioning theory that are added to the industry level of the producers, in order to differentiate between publishers. The third and last one concerns the *value regimes* and the singularity of comics, as experienced by individuals. This dimension is added to the individual level of the producers.

Processes that concern the producers and the products, and that take place during the co-evolutions include identity forming, legitimation, competition, selection, adaptation and institutionalization.

The co-evolutions that take place in a country are related to those in other countries. To imagine this, for each of the countries that this research addresses, a similar model as in Figure 2.1 can be drawn. Both models are also connected by double-sided arrows. These would represent the transnational co-evolutions in the comics industries (see Figure 2.2).

Figure 2.2 The Vari-focal model for two countries (Belgium and The Netherlands)



The double sided arrow between the two countries refers to co-evolutions between all actors and factors of both countries, to co-evolutions between separate actors and factors, and to combinations of them.

Just like in other co-evolutionary research, it is not realistic to pay attention to all co-evolutionary processes to the same extent. In many publications that use CP, the stress is on the most relevant co-evolutions, those that can help answering the main questions of the researchers. Examples are questions with regard to micro- and macro-level co-evolutions between competence and competition in the popular music industry (Huijgens 1999), and the transnational co-evolutions between products, institutions and firms in the 19<sup>th</sup> century dyeing industry (Murmman, 2003). In my research I will especially pay attention to the co-evolutions between firm and industry, between products, audiences and producers, and to its transnational dimension.

The model will be evaluated for its value added in the Chapters 5 to 7. Before that, Chapter 3 will pay attention to the research methodology, and Chapter 4 will provide a concise history of the history of comics and their publishers in the Dutch language area.



# **CHAPTER 3**

## **METHODOLOGY**

### **3.1 INTRODUCTION**

Triangulation is the key-word in the methodology of most co-evolutionary research, and certainly in this one. Jick (1979) discerns methodological and theoretical triangulation. Here both kinds are applied. The details of the theoretical triangulation were already explained in the previous chapter. This chapter will pay attention to the methodological triangulation. The multi-level nature of the research, that includes contextual developments, events in a population, dynamics in single organizations, and roles of individuals in these firms, inevitably leads to a variety of methods used to collect and analyze the data. The most important elements of these data are a database, secondary literature, and interviews.

For the macro-level part of co-evolutionary research, data are needed over a long period, in this research related to comics publishers, artists, comics themselves, and environmental institutions. This involves both quantitative data (populations of publishers, numbers of albums) and qualitative data (historical events). There is a lot of secondary literature available, both popular and academic, about the historical developments of comics in Belgium, including descriptions of the changing roles of publishers and artists. The literature about Dutch comics is less abundant, but there is enough information for an overview of the dynamics within the comics niche in The Netherlands.

In the Chapters 4, 5, and 6, a database will be used that contains the titles of all comic albums and magazines produced in The Netherlands and Flanders. The database mentions title, series, year of publication, name of publisher, and names of creators. In the period that the database covers almost every comic album published in Wallonia was also published in Dutch. This implies that the database gives an overview of Belgian comic albums that appeared in French as well as in Dutch. Only since the end of the previous century the policy of the major Wallonian publishers changed and they became more selective in publishing Dutch versions of



their albums. Other reliable figures about the complete population of publishers (e.g. about size, turnover, and sales of the publishers) are not or hardly available. This limits the possibilities of measuring the success of the publishers and their products.

The Section 3.2 introduces the *SDCN-database*. This database, interviews with editors, publishers, translators and distributors, and other (secondary) sources are used for the historical overview in Chapter 4. This chapter has a descriptive character and therefore a separate methodological section is not necessary. The event history analyses in Chapter 5 based on the same database surely do need such an introduction. This is the subject of Section 3.3. The variables and models used in these analyses are described in detail in Chapter 5 itself.

For the micro-part of co-evolutionary research, that analyzes the interaction between comic books, individuals, organizations and organizational fields, detailed information is needed with regard to a smaller number of organizations and actors. The actors involved are publishing companies and individuals (publishers, artists, translators, distributors, editors), and the non-human ‘actant’: the comic books themselves, as objects. For the case studies both market-focused and artist-focused publishers will be chosen in each country. Case studies like these mainly have a qualitative nature, but additionally quantitative sources can also be useful (Yin, 2003, Eisenhardt, 1989). This is why not only interviews and secondary literature have been used in Chapter 6, but also the database mentioned above and other, more recent data. The methodology for the case studies will be elucidated in Section 3.4. Subsequently, in Section 3.5, attention will be paid to the methodology of the co-evolutionary analysis in Chapter 7. The conclusion (Section 3.6) abridges this chapter to the next ones.

## 3.2 DATABASE OF COMICS AND THEIR PUBLISHERS

### 3.2.1 Introduction

For this research a dataset is used that is derived from several sources. The most important source is the *SDCN-database* (2005). It was provided by the Dutch institution SDCN (*Strip Documentatie Centrum Nederland*: the Comics Documentation Centre of The Netherlands), that is part of the library of the University of Amster-

dam. This database is used for bibliographical purposes by SDCN, who own a large collection of Dutch language comics. The most important sources for the *SDCN-database* are the *Stripkatalogus* (Matla 1998; from now on referred to as *Stripkatalogus*), and *The Collector's File* (Vranken *et al.*, 2001; from now on referred to as *The Collector's File*).

Hans Matla's *Stripkatalogus* is considered to be the most complete printed source in the area of Dutch language comics, and is used by Dutch libraries including the *Royal Library* (*Koninklijke Bibliotheek*; from now on referred to as KB) as their reference for comics. Matla almost personifies comicsfandom in The Netherlands. He was involved with the Dutch comicsfan society *Het Stripschap* since its foundation, started one of the earliest comics shops in The Netherlands, and owns the comics publishing company Panda that has become specialized in high quality reprints of Dutch comics series that can be considered as cultural heritage (a.o. the complete *Bommel* stories by Marten Toonder and the complete *Eric de Noorman* by Hans G. Kresse). But especially he is the owner of the largest collection of comic albums and magazines in the Dutch language area.

In 1977 Matla published the first edition of his *Stripkatalogus*, which contained a list of all Dutch language comics that had been identified until then. Chronologically Dutch comics publishing started in 1858 with *De Reizen en Avonturen van Mijnheer Prikkebeen*, a translation from French of *Monsieur Cryptogame* by Rodolphe Töpffer. Töpffer was a Swiss artist who now is generally regarded as the creator of the first comic albums according to modern definitions of the medium. The album was published by the Dutch publisher Erven Van Bolhuis Hoitsema.

The most recent *Stripkatalogus* that has been published until now is the 9<sup>th</sup> edition, published in 1998. In the editions after 1977 Matla's catalogue contained more and more comics: new titles, but also older publications that were discovered by Matla and others who assisted him in his search for a complete comics bibliography. Matla and his catalogue became institutions in the Dutch comics field. Publishers send him free copies of their new albums, as if Matla was a kind of KB himself. His primary aim was to provide a catalogue for comics collectors. Comics shops and collectors also use the catalogue for trade purposes: most publications in the *Stripkatalogus* contain an estimation of their worth (still in Dutch guilders). Matla was involved in the comics database *The Collector's File* (2001). This is a digital version (a cd-rom) of Matla's catalogue, but with numerous changes and extended

with comics that were published in the period 1998-2001. However, the database is not complete after the year 1998, especially with regard to comic magazines.

The *SDCN-database* contains Dutch language comics that have appeared in The Netherlands and Belgium until the year 2001, either translated or originally in Dutch. Just as in the case of *The Collector's File*, the SDCN data are not complete after the year 1998. The database includes comic albums, comic magazines, and secondary literature about comics. For the purpose of this research only the albums and magazine parts of the database will be used.

The most relevant variables in the database for the purpose of this research are names of publishers, names of albums and magazines, the year in which they have appeared, names of artists, of series, numbers of magazine issues and of installments in album-series, different versions of albums, the collector's value of the albums and magazines, information about the format (hard cover/soft cover), and edition (first print or reprint). Because of the fact that the names of the publishers and the year of production are included in the database, it is possible to derive the population of publishers from it, whom have occupied themselves with Dutch language comics since its earliest days.

### 3.2.2 Limitations of the database

Although the database contains relevant variables, it certainly has its limitations: there is no information about the birth date of the organization and its possible decease. It only shows for how long the organization has been publishing comics. Neither is information included about relevant topics like the organization's size, its turnover, the country of origin, the circulations of the albums and magazines, the revenues from the sales, the original consumer-price for the publications, or the original language of the publications. This implies that on the basis of the database alone it is not possible to draw conclusions about the success of the publications and of their publishers.

To give an example: the Belgian firm Casterman, that already exists since the end of the 18<sup>th</sup> century, started publishing comic albums in 1934, at first only in French, and after World War Two also in Dutch. During a long period Casterman only produced a limited number of comic album series, not accompanied by a magazine

in which these series were pre-published - contrary to their strongest competitors Dupuis, Lombard and Dargaud. Although their share in the total Dutch language comic album and magazine production is smaller than that of their competitors, it cannot be concluded that Casterman performed worse. Among their series was *Tintin* (*Kuifje* in Dutch), one of the best selling comics series in Europe,<sup>1</sup> created by one of the most influential European comics creators: Hergé. The Dutch language editions have also sold well - although exact figures are not available. Until these days, the 24 albums from the *Tintin*-series are reprinted over and over again in many languages, including Dutch, and are still available. The first, French language editions of the *Tintin* stories, that already appeared as albums since 1930, and were published by Casterman since 1934, had a format (large, rather luxurious albums with a hard cover) that later became the default format for French language albums, also because other productive and large Belgian and French publishers like Lombard and Dargaud consciously copied it. This kind of historical and contextual information is necessary to draw conclusions about the effectiveness of individual publishers.

### 3.2.3 Album or magazine?

A problem that might be called symptomatic for comics, concerns the assumptions behind the categorization of a comics publication as an album or a magazine. In the *SDCN-database*, this division is based upon a pragmatic choice. The database contains the complete SDCN collection, but also includes publications that are not (yet) part of that collection. The SDCN collection is physically stored in one of the depots of the library of the University of Amsterdam. In this depot all comics publications are divided into two groups: those publications that can be placed next to each other in the shelves, and those that can only be piled horizontally, that is: laid upon each other (Schuringa, 2010). All comics that belong to the first group are classified as ‘albums’, all comics that belong to the second group as ‘magazines’. Comics that can be stored as books, with cardboard covers or with a more solid kind of paper used for the cover than for the contents, belong to the albums, and publications with soft paper covers belong to the magazines.

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<sup>1</sup> Until 2004 an estimated 193 million *Tintin*-albums were sold worldwide, which puts *Tintin* on the third position in the Top Three of Europe’s best selling comic albums, after *Asterix* (320 million) and *Lucky Luke* (200 millions) (*Capital*, 2004, p. 52-55).

In comparison with the classification used by Matla (1998) there are some important differences that are related to the different purposes of the *SDCN-database* and Matla's *Stripkatalogus*. Matla has brought together all comics in the category comic albums ('stripboeken') that contain only (or mainly) stories about the same comics characters, by the same authors (individuals or studios). His category comics magazines ('striptijdschriften') contain publications with stories about several comics characters, often created by varying artists. On the title page of the chapter on comic albums in the catalogue Matla sums up a list of twenty-one subcategories that belong to the main category comic albums. Among these is the subcategory 'magazine-albums'. The name of the subcategory already implies that these are a mixture of a regular album and a magazine. According to Matla's definition of the magazine-album they have a soft cover, a size of 25 by 17 centimeters, the frequency of appearance of a magazine, the homogeneous contents of a book, and a numbering of the series that continues independent of volumes (Matla, 1998, p. 6).

In practice all these conditions are met by American style comics (superhero comics like *Superman*, *Batman*, *Spiderman*, *X-men*, etc), although Matla does not mention this in the definitions section. In The Netherlands these American comics were published by among others Classics, Williams, Semic Press and Junior Press. The magazine-albums category is also used by Matla for smaller sized comics, that are often referred to by other comics collectors as 'mini-comics', 'pocket-comics' or 'pulp comics'. Made of a low quality of paper, these small sized publications appeared by dozens of series from the 1960s until the early 1980s, and were published by De Vrijbouter, De Schorpioen, Nooitgedacht and (again) Classics and Williams, weekly, biweekly or monthly. They were cheap, had low quality artwork, were printed in black and white, and were available at almost every kiosk and supermarket. Among them are series that combine erotics with war and violence (with titles like *Terror*, *Oltretomba*, and *Hessa*), but also many 'pure' war, horror, romance, detective and western comics. The mini-comics were often created by Spanish and Italian studios with anonymous artists, and were exported to other European countries as well.

In the *Stripkatalogus* the subcategory is not part of the information at the individual entry of an album, so that it remains unclear which publication belongs to which subcategory. In *The Collector's File* there is a subcategory 'comics' that is comparable with Matla's category 'magazines-albums'. According to the 'statistics' option in the menu of that database, this subcategory has 7,324 records.

A comparison with the *SDCN-database* reveals that Matla's category 'magazine-albums' is classified as magazines by SDCN. So, whereas according to Matla these publications belong to the albums, SDCN has classified them as magazines. If we take the counting of the category 'comics' in *The Collector's File* as our guide-line, this concerns 7,324 publications.

Although for the purposes of Matla's catalogue it is quite understandable why he chose to categorize the 'magazine-albums' as albums, for my purposes it is more logical to use the classification of the SDCN, and categorize them as magazines. The main reason for this is their publication frequency. Magazine-albums appeared in a steady frequency, whereas regular albums appeared with varying intervals. The exact frequency (weekly, bi-weekly or monthly) of magazines and magazine-albums is mentioned in the publication itself, so that the consumer knows when he can expect the next volume. Also the magazine-albums appear more frequent than is usual for other comic albums. This frequency of appearance has consequences for distribution and diffusion systems. The main distribution systems are based on frequency of appearance of books and magazines, and their availability in book-stores, kiosks, warehouses and supermarkets. The magazine-albums were distributed by magazine distributors, and especially sold in kiosks and supermarkets. However, this also was the case for many comic albums that appeared less often, and that according to both SDCN and Matla clearly belong to the 'album' category. So, although the magazine-albums are probably the greyest among all comics formats in the marginal-area between book and magazine, the more regular comic albums are only relatively less grey.

These classification problems show that the publication format of comics can easily be observed as a hybrid between a magazine and a book. This adds another dimension to the hybridity of comics. The previous chapter already mentioned that comics as a medium can be seen as a hybrid: a combination of images and narrative. In the next chapter attention will be paid to the consequences of both dimensions of hybridity for the legitimacy of comics and their publishers. If we apply Suchman's (1995) division of legitimacy into the three types moral, cognitive and pragmatic<sup>1</sup> to these dimensions, the first dimension (comics as a medium) can be associated with legitimacy issues on a cognitive and moral basis, whereas the second one

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<sup>1</sup> See Chapter 2 for Suchman's definitions of these types.

(comics publication format) is related to legitimacy on a cognitive and pragmatic level.

### 3.2.4 Checking the SDCN-database

To check the database and be able to correct mistakes, different sources were used and combined.

1. Digital and online comics resources:
  - The catalogue of the *Royal Library (Koninklijke Bibliotheek: KB)*.
  - Databases for comics collectors on cd rom or downloadable via Internet: *the Collector's File, the Stripdatabank*.
  - Websites for comics collectors containing online databases: Dutch language: *Catawiki, De Zilveren Dolfijn*; French language: *BD Gest* and *Bedetheque*.
  - Websites with information about comics artists and history: *Lambiek.net*
2. Printed sources: Matla (1998, the *Stripkatalogus*), Kousemaker and Kousemaker (1979), Bera, Denni and Mellot (1996; by collectors often referred to as '*the BDM*': the *BDM* is the most complete printed catalogue of French language comics).

Apart from the *KB catalogue*, which is maintained by professional librarians, these resources have been compiled by comics fans, for their own purposes. There are no other, professional databases. Although fans are not professionals, their endeavor to be as complete as possible in their databases has been helpful in organizational research on other cultural industries as well (e.g in the film industry: see Jones, 2001 and Hsu *et al.*, 2009). In the Dutch, Belgian and French comics worlds the sources mentioned above are the best known and widest used comics databases.

A scrutiny of the *SDCN-database* resulted in the discovery of a number of mistakes in the database: in some cases it was clear that the same publishers were referred to with varying spellings. In other cases the same albums or magazines were included twice, under different names. Applying the criteria of the *SDCN-database* revealed that some albums were categorized as magazines and the other way around, or in both categories. All these records were repaired. Records that concerned publications in other than the Dutch language were omitted from the database, as well as secondary literature and other books of which it was clear that they were not comic

albums or magazines (e.g. books with illustrations instead of comic albums, calendars and postcards).

### 3.2.5 Additions and changes to the magazines-data in the original database

Two early comic magazines that are mentioned in other sources, and for unclear reasons were lacking in the *SDCN-database*, were added. This concerns the Flemish magazine *Kinderwereld* (1915-1920) and the Dutch magazine *Het Dubbeltje* (1922-1924). According to Kousemaker and Kousemaker (1979) *Het Dubbeltje* is the oldest Dutch comics magazine, so it certainly should be included in the database.

The year of publication was missing for 1,497 magazine issues in the database. The use of the alternative sources proved to be very fruitful here: after the corrections there are only two issues of magazines left of which the year of publication remains a riddle. In the original database the name of the publisher was missing of 1,024 magazine issues. After adding information from the other sources this is limited to 55 issues (0.1% of all magazine issues), of which 54 issues are of a magazine that only appeared in 1954, and of which the 55<sup>th</sup> is a ‘one issue-magazine’ that appeared in 1948.

### 3.2.6 Additions and changes to the album-data in the original database

For 310 albums in the database the field with the year of publication was empty. After investigation, using the sources mentioned above, the year of publication of the albums could be traced for all but 51 albums (0.2% of all albums). Of 359 albums the publisher was unknown. Tracing these publishers proved to be far more complicated than finding the year of publication or finding the missing publishers of magazines. We were able to find publishers of 32 albums, but that means that names of publishers are still missing for 327 albums (1.2% of all albums). Many of these publications have an illegal status, as became clear when *Stripkatalogus* and *Catawiki* were consulted. This explains why the name of the publisher is not mentioned in the album itself, and thus also lacks in the *SDCN-database*. All these albums get the label ‘publisher unknown’, so that they are recognizable for the



analyses of the publishers' population. They deserve special attention, because although they have the same label, they have of course not been published by one and the same publisher.

After these changes and additions, the database contained 75,658 records: 26,671 albums that cover 4,075 series, and 48,987 magazine issues belonging to 653 different magazine titles. As was already said above, the list of publications in the *SDCN-database* is not complete after the year 1998, especially with regard to comics magazines. For this reason the most recent year included in the analyses in this chapter is 1998.

In total 1,423 publishers have been active in the field of Dutch language comics production. 1,301 of them have produced albums and/or magazines, and 122 have only produced magazines. Some of them have published thousands of comics, albums as well as magazines, and have been active in this area for decades; many others have published only one comic album, or even just one issue of one magazine, and left the field after that.

### 3.2.7 Data 1945-1998

For the analyses of the developments in the period 1945-1998 in Chapters 4 and 5 a selection was made of the complete database. This selection contains 69,708 records; 92% of all the records in the database. Before World War Two, only 8% of the comics in the database were published. This shows that the production of comics only became a real industry after the war. Among these comics are 46,148 issues of 637 different magazines, and 23,560 albums. In this period 1,283 publishers were involved in the production of comics, 1,079 of albums, 110 of magazines, and 94 of albums as well as magazines. Table 3.1 summarizes the contents of the database.

Table 3.1 Core information about the database

	<b>'cleaned' SDCN-database</b>	<b>selection database for period 1945-1998</b>	<b>% selection 1945-1998 of total database</b>
publishers	1,423	1,283	90%
albums	26,671	23,560	88%
magazine issues	48,987	46,148	94%
magazine titles	653	637	98%

### 3.2.8 Additional variables for the album publishers in the database

For the purpose of this research, the dynamics in the production of albums get more attention than those of the magazine production. For the analyses of the album production two variables with more information about the publishers proved to be a necessary addition.

#### 3.2.8.1 *Hit & run or real publisher*

Not all of the 1,301 organizations in the database that have produced albums can be considered 'real' publishers. Comics have often been used as an advertisement or promotion tool, because of the popularity of comics characters. This close relationship between marketing and comics dates back to the early 20<sup>th</sup> century. Comic albums published for these promotional purposes were often given for free, as a gift, and do not play a role in the competition between regular publishers. The primary processes of the organizations that (co-)produce them are quite different from those of regular publishers of comics, books, magazines or newspapers.

In order to get a more valid list of publishers that actually were involved in this competition, these organizations are labeled as 'real publishers', and the organizations that only have produced comics for promotional purposes are labelled as 'hit & run' - publishers (from now on referred to as 'h&r'). This allows us to filter them

out from the whole population, if necessary. The database itself and the other sources provided the information that was necessary to trace the status of the organizations. The h&r category has 374 organizations in it (29% of all album producers). Although their absolute and relative number is quite high, the h&r share in the total album production is low: only 4%.

Most of the h&r publishers have produced a modest number of albums, which justifies their common denominator. Only some of them have published more albums: their comics have become an extension of their brands. Striking examples are the Dutch *Flipje* albums published by De Betuwe. De Betuwe is a manufacturer of fruit products like jam. The *Flipje* albums have been produced since 1934, and are still available. The database mentions 95 *Flipje* books in the period 1934-1999. *Flipje* as a character is well-known by generations of Dutch people, and its picture is part of the logo of De Betuwe. Nevertheless, De Betuwe cannot be called a regular publisher.

#### **3.2.8.1 Country of origin of the publisher**

In order to compare the developments of the populations in The Netherlands and Belgium, the country of origin of the publisher had to be known. This information was not included in the database, but could be traced by using the other sources. The albums of which the publisher was unknown were not included in this laborious quest. In the end, of only six publishers (0.5% of all album publishers) it appeared impossible to find out where they came from. Their contribution to the album production was also very modest: five of them produced only one album, and one of them produced four albums (of the same series) during one year. Together these nine albums are 0.03% of the total album production.

### **3.3 METHODOLOGY FOR THE ECOLOGICAL ANALYSES**

In Chapter 5 concepts from organizational ecology will be used, that were introduced in Chapter 2 and integrated in the conceptual framework in Section 2.7.3. Section 5.2 describes the consequences of the ‘de alio’ and/or ‘de novo’-

organizations ratio for the niche identity of the comics publishers, using descriptive statistics.<sup>1</sup>

In 5.3 and 5.4 two event history analyses are done concerning the population of comic album publishers. Resource partitioning theory provided the concepts for the hypotheses that will be tested in these sections. The first analysis concerns the entry of new organizations in this niche, and the second one the hazard of exit. Entry analysis focuses on the relationship between numbers of newcomers or entries in an organizational population on a certain moment, and characteristics of incumbents of that same population. The hazard of exit refers to the risk for an organization to disappear from the niche. In ecological terms such a disappearance is labeled an 'exit'. An exit does not necessarily mean that the organization stops to function. In the context of this study it simply means that a publisher stops producing Dutch language comics. The analysis addresses factors that possibly influence the exit-behavior of album publishers. More detailed information about the variables and models that are used is provided in the Sections 5.3 and 5.4.

### 3.4 METHODOLOGY FOR THE CASE STUDIES

#### 3.4.1 Introduction

There are various kinds of case studies: some are meant to develop theory, others have an exploratory or illustrative purpose (Yin, 2003). In my research, the case studies belong to the second category: they explore the theoretical concepts already framed in the model in Chapter 2, and illustrate the behavior of individual publishers that belong to the population analyzed in Chapter 5. This kind of case study research has another aim than theory constructing research, like the grounded theory studies by Strauss and Corbin (1998).

For grounded theory, that has a strongly inductive character, theoretical propositions should be avoided. This is not the case in my research, because an integration of theories that were already available provided the conceptual framework. The integration itself is my main contribution to earlier research.

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<sup>1</sup> In Section 5.2 it will be explained why the analysis has been limited to descriptive statistics.

The ecological analyses in Chapter 5 are deductive and are based on the testing of hypotheses. The case studies in Chapter 6 are partly inductive and partly deductive. By their nature case studies cannot test hypotheses in a statistical way, but it is possible to explore if and how propositions are confirmed that are based on theoretical concepts. These propositions will be introduced in Chapter 6.2.

As Yin says, exploratory case studies like these “should be preceded by statements about:

1. what is to be explored,
2. the purpose of the exploration, and
3. the criteria by which the exploration will be judged successful” (2003, p. 30).

To start with (1): the case studies in Chapter 6 pay attention to the micro- and meso-level of comics publishers: the individual publishers and their context (competitors, audiences, institutions), and the roles of individuals within these organizations. The purpose (2) is to test the propositions and to find out if and to what extent the evolutions of different kinds of publishers from two different countries (The Netherlands and Belgium) and the comics they produced can be compared with each other, how their logics and value regimes have developed, and how individuals (editors, publishers, artists) have contributed to evolutions of the medium. Yin’s third and last condition, (3) to make clear when the exploration will be judged successful, can be met if the questions mentioned under (2) are answered by using the concepts from the model, and if these answers provide information that can be used for the co-evolutionary analysis in the final chapter.

Yin indicates that cases studies are especially useful if a researcher wants to ‘cover contextual conditions - believing that they might be highly pertinent to your phenomenon of study’ (Yin, 2003, p. 13). This is indeed the case. The 4<sup>th</sup> and 5<sup>th</sup> chapters of this study pay attention to contextual dynamics, but mainly on a high aggregation level: that of the entire population of publishers.

More detailed information is necessary to understand the consequences of these dynamics for individual publishers, and the active role that an individual publisher can play. Then it also can become clear why a publisher decides to enter the comics niche, or why he exits from the niche, and what his role is in resource partitioning (the events analyzed statistically in Chapter 5): exploiting already discovered resources, or exploring new resources. It is impossible to find such detailed data for

all publishers in the database. A sample has to be made, that is not chosen for statistical, but for theoretical reasons (Eisenhardt, 1989). In line with Eisenhardt polar cases will be chosen ‘in which the process of interest is “transparently observable”’ (Eisenhardt, 1989, p. 537).

### 3.4.2 Selection criteria for the cases

The cases are chosen from the population of all comic album publishers that have produced albums in the Dutch language area. The main question in the research concerns a comparison between Dutch and Belgian co-evolutions. Therefore publishers from both countries should be chosen for the cases. In Belgium both language areas (Wallonia and Flanders; respectively French and Dutch speaking) should be represented by the case publishers. Another criterion concerns the identity of the publisher. In ecological terms, publishers are classified as *de alio* or *de novo*. Organizations from both categories should be selected for the cases. The cases should also represent generalist and specialist organizations, to take the main categories from resource partitioning theory into account. The level of interest for the artistic side of comics partly depends on the logics applied by publishers. The extremes market-oriented and artist-oriented logics should be represented in the cases as well.

The inclusion of varying criteria for the choice of polar cases at the same time does not necessarily mean that this leads to a large number of cases. On the contrary, it can be expected that there is an overlap between categories. To illustrate this: *de alio* organizations are most of the times generalists. They enter new niches when they think that they can reach a new, large audience with a product, but also remain active in their original niche. *De novo* organizations are specialists in products for a more limited market, in one niche. Often generalists are large, market-oriented organizations. In general specialists are smaller than generalists who are active in the same niche. However, specialist comics publishers can be either market- or artist-oriented: in this respect there is not necessarily an overlap. The partial overlap between selection criteria can lead to a more limited number of cases than might be expected at first sight. The actual number depends on the point when theoretical saturation is reached (Eisenhardt, 1989, p. 545).

### 3.4.3 Selected cases

Using the criteria mentioned above, secondary literature and the database were studied to select publishers. The overlap between the criteria led to the limited number of four cases. Already at that point theoretical saturation was reached.

The cases are: VNU, Oog & Blik, Dupuis and Bries. These cases represent The Netherlands and Belgium and also fit the polar extremes of the criteria. VNU and Oog & Blik are Dutch; Dupuis and Bries Belgian. Dupuis is a francophone, Walloonian publisher (although it has a Dutch language department and many comics have been translated into Dutch); Bries is from Flanders and Dutch-speaking (although many of their comics are in English, for the international market). VNU and Dupuis are (relatively) large, *de alio*, market-oriented generalists, whereas Oog & Blik and Bries are (very) small, *de novo*, artist-oriented specialists. The most extreme differences are those in size, between VNU and Bries: VNU had over 19,000 employees worldwide in 1999 (Johannes and Cohen de Lara, 2005, p. 257), two years before it sold its magazines to Sanoma, whereas Bries has been a one person firm since the start: the founder is the owner and has remained its' only employee.<sup>1</sup>

From secondary literature it appeared that VNU and Dupuis played an important role in the development of comics in the 20<sup>th</sup> century in their home countries (and Dupuis also internationally), just as Oog & Blik and Bries played an important role in the diffusion of innovative comics in The Netherlands and Flanders at the end of the 20<sup>th</sup> and the beginning of the 21<sup>st</sup> century.

Together the aspects mentioned above make the four publishers suitable candidates for the case studies. Before the selection was made, other publishers had already been interviewed as well. In addition interviews with translators and distribution companies had been held. The information from these interviews was also used in the case studies, as far as relevant, and in Chapter 4.

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<sup>1</sup> NB: VNU was a generalist; it published a large number of magazines, but also newspapers and books. Only a modest number of VNU's employees were directly involved in the production of comic magazines and albums.

#### 3.4.4 Data collection methods

Within the case studies triangulation of data was used, just as on the overarching level of the entire research. Secondary literature was available about each of the publishers. Sources are monographies about VNU and Dupuis, historical books about comics in The Netherlands and Belgium, and articles from (mostly) popular journals and newspapers. The main sources for each publisher will be mentioned in the sections dedicated to that publisher in Chapter 6 (the complete list of references will of course be part of the general bibliography). Especially some long articles and interviews in fan magazines were useful, because of the detailed information. A comparison with other sources was useful to discover biased or incomplete information.

Some of the leading people from the case publishers have been interviewed many times. This enabled me to check the findings from my own interviews with the same persons. Of each case organization at least one person was interviewed, preferably an editor or a publisher.

The *SDCN-database* provides overviews of all the comics published by the case publishers, including year of publication, format and type of publication (album or magazine, soft or hard cover) names of artists and series. Other lists, like publishing lists of the publisher itself, or data from the Royal Library, were used to control the *SDCN-database*. These lists give a first impression of the developments that have taken place in the course of the existence of the publisher. The interpretation of the dynamics in the publishing list was one of the topics for the interviews.

Because the *SDCN-database* is only reliable until 1998, other, (smaller) databases were used for years after 1998 (the exact sources for these databases will be mentioned in Chapter 6). Bries was founded in 1999, so the *SDCN-database* was of no use for the Bries case study. The databases were also used to add quantitative data to the qualitative data (texts) from the other sources, concerning numbers of comics and series produced annually, numbers of artists published annually, proportions of comics in original language versus translated comics. This increased triangulation of the data. If available and if relevant other figures were also collected, like those concerning the annual turnover of the company (derived from the *Orbis database*), the publisher's size (numbers of employees) and circulations of magazines and albums.



After having studied secondary literature and the database, contact persons were approached with the request to participate in the research. Information from the first contact persons was used to contact other persons, if this appeared to be relevant for the research.

The specialist publishers Oog & Blik and Bries are small and have a relatively short history. Therefore it was not only unnecessary to interview many people, but also hardly possible. The founders and owners were approached, and they participated.

In the cases of the much larger and older generalist publishers Dupuis and VNU there were far more options for interviewees, but there was also far more secondary literature available, at least about Dupuis. With regard to Dupuis, there was much information about the Wallonian publishers and editors, but only limited information about the Dutch language department of Dupuis. This led to the choice to interview two editors who had worked for this department during a long time.

Another reason to do this was that these people could probably tell more about the differences and similarities between the developments of comics in both language areas in The Netherlands and Belgium, than the francophone editors, because they had worked on the border of the Dutch and the French language comics in one and the same company. Moreover, one of these two persons (Peter Middeldorp) continued his career as editor and magazine manager for VNU after he had worked for Dupuis in the 1950s and early 1960s. He used his knowledge of francophone comics and Dupuis' marketing strategies in The Netherlands. This made him an ideal source for more information about the role of an individual in transnational evolutions of comics.

The information about VNU with regard to comics was limited. There is a monograph about VNU (Johannes and Cohen de Lara, 2005), but comics are hardly dealt with in that book, because they were only one of the many media that VNU produced. This meant that more VNU-editors and publishers had to be interviewed than had been necessary in the case of Dupuis. Many former editors of VNU started their own comics publishing company after they had left VNU. They probably used their knowledge of (international) evolutions of the medium in the new organizations. This is the reason why for VNU interviews a number of people were chosen that had made this step from the *de alio* generalist VNU to a self-owned *de novo* specialist. Some VNU contact persons mentioned names of others,

who could possibly also have relevant information for the purpose of the study. These candidates were also approached. No one refused to participate.

### 3.4.5 Protocol and topics for interviews

Before the interviews started, the interviewees were asked permission for recording the conversation. All interviewees agreed. The interviews lasted from forty minutes to three hours, mainly depending on the information that was needed. They were digitally recorded and transcribed completely afterwards, partly by myself, partly by students. In both cases the transcripts were checked afterwards by me. If parts of the answers were not clear, the interviewed persons were contacted again to clarify the answer. This was only necessary in a few cases. All persons who were approached with such requests helped to clarify their original answer. A list of interviewees can be found in Appendix I.

The interviews were half-structured. That is: a list with topics was used during the interview, but if other relevant subjects turned up, the interviewees were allowed to talk about these topics also. After the first two interviews, the topic list was improved for the other interviews. The topics were partly the same for each publisher, and partly they differed. The differences were related to the amount of information that was already available about the case publishers from secondary literature. The topics that were the same for all interviewees can be listed as follows:

1. Reasons for entering as a publisher and for starting to work as a comics editor.
2. Reasons for leaving the niche of comics ('exit'; if applicable).
3. In the case of a merger or acquisition: why and how did this happen.
4. Evolutions of comics and of publishing strategies during the existence of the publisher.
5. Value regimes of the interviewees, the role of singularity: personal interest in comics ('just a job', or passionate: a comics 'fan').
6. Dominating logics of the publisher.
7. Ties with artists, with other publishers or institutions.
8. Explanations for successes and failures.
9. Explanations for differences between Dutch and Belgian comics niches.

Questions about institutional logics, value regimes and singularity were not asked directly, because that would either be incomprehensible for the interviewees, or lead to biased answers. The interpretations of the answers are described below.

### 3.4.6 Analyzing the data

After the data were collected, the next step was the analysis. At first a within-case analysis was done for each publisher, which was followed by a cross-case analysis (Eisenhardt 1989).

#### 3.4.6.1 *Within-case analysis*

The first part of the analysis pays attention to the evolutions of each of the four case publishers separately. They are all divided into four parts:

1. The entry of the publisher into the comics market;
2. The changes within the publisher;
3. The value regimes of individuals within the publishing company and the logics of the organization, and finally
4. The exit of the publisher (if applicable).

The *first and fourth parts* analyze the reasons for publishers to enter or leave the comics niche. The case publishers are individual illustrations of the essential demographic variables from organizational ecology (birth or entry in comics publishing, and death or exit from comics publishing), as dealt with in Chapter 5 for the whole population of publishers. The *second and third parts* of the within-case analysis need more explication.

The *second part* follows the three dimensions of organizational change discerned by Pettigrew (1987):

1. the content,
2. the inner and outer context, and
3. the process.

Pettigrew's differentiation is also used by Huijgens (1999) in his analysis of micro-co-evolutions of record companies.

***Ad 1.***

The *content* is related to the internal changes of the publisher (structure, strategy), but also to the changes of the comics as a product. This information answers the question "what has changed?".

***Ad 2.***

The *context section* deals with the question "why did the organization change?" The context can be divided into the inner and the outer context. The *inner context* refers to aspects of the organization itself that cause or influence changes in content. The *outer context* refers to general environmental factors, institutions, audiences of the publisher (artists, distributors, fans, critics), and the developments within the (international) field of comics publishers (as mentioned in the framework in Chapter 2), among which are the competitors of the focal publisher. Especially these parts are important for gaining insight into the varying evolutions.

***Ad 3.***

The process is about questions that concern the 'how' of the evolutions.

The information concerning content, context and process are integrated in the text, because a separation would lead to a very artificial account. The three aspects of evolutions are summarized separately in a table for each of the cases. These tables can be found in *Appendices III to VI*. All relevant changes within a company will be mentioned in this chapter, but they will be reconsidered critically in the next chapter for the co-evolutionary analysis.

The *third part* refers to the concepts of Boltanski and Thévenot (1999) with regard to differing value regimes, to Heinich (1996)'s concept of singularity, and to Fligstein (1990) and Thornton (2004)'s institutional logics, here interpreted in terms of esthetic logics versus market logics for art organizations, as done earlier by Glynn and Lounsbury (2005). Which individual value regimes can be discerned, according to the information derived from my own and other interviews with individuals (editors, publishers), and which logics dominate within the companies?

The answers from the interviews were interpreted as follows: if an interviewee used less rational, and more emotional expressions to describe his/her motives for

working in the comics business, then these utterances were interpreted as belonging to an inspired value regime.<sup>1</sup> If the interviewee described him/herself as a true comics fan, this was interpreted in terms of singularity. If on the other hand the answers were dominated by rational expressions and business matters like sales, marketing, making money by selling comics, and buyers of comics, this was interpreted as belonging to the market/industrial value regime. Boltanski and Thévenot (1999) assume that the same people can use more value regimes, depending on the context. Glynn and Lounsbury (2005) showed that art organizations can use a mixture of esthetic and market values. Therefore it can be expected that in the case organizations there will also be a combination of value regimes. The stress in my study will be on the dominance of specific value regimes. Attention will be paid to differences between the individual level and the organizational level, and to the dynamics of these logics.

#### ***3.4.6.2 Cross-case analysis; enfolding literature***

Eisenhardt (1989) describes case study research that builds theory, whereas the case studies in my research illustrate and explore conceptual combinations derived from already existing theory. By using propositions based on these concepts, two phases (cross-case analysis and enfolding literature) of case study research that Eisenhardt describes separately are integrated. The propositions are introduced in Section 6.2, before the within-case analysis. These propositions structure the cross-case analysis that takes place in Section 6.7. This cross-case analysis contains three levels of comparison: between the *de alio* publishers, between the *de novo* publishers, and finally between the Dutch and the Belgian publishers. The information from the cross-case analysis is used to confirm or reject the propositions. In the discussion of the findings literature is enfolded that helps to explain unexpected outcomes. If the evidence is strong enough the findings can help to make the theories more generalizable.

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<sup>1</sup> E.g. if the interviewee said that he/she had desired to work for a comics publisher for all his/her life, that he/she had already been fond of comics as soon as he/she could read, and that he/she was a passionate comics collector, than these answers were interpreted as expressions of an inspired value regime.

### 3.5 METHODOLOGY FOR THE CO-EVOLUTIONARY ANALYSES

In the Chapter 7 the outcomes of the empirical Chapters 4 to 6 will be combined. The analyses in the Chapters 5 and 6 are respectively about dynamics within the whole population and about the changes within and between single firms. Only a part of the results refers to co-evolutionary events. Here Murmann's statement about co-evolutions can be useful: 'two evolving populations coevolve if and only if they both have a significant causal impact on each other's ability to persist' (Murmann, 2003, p. 210). Other changes might refer to 'simply parallel development or co-adaptation' (Volberda, 2005, p. 447). In order to select the truly co-evolutionary findings from the other ones, the findings will be reformulated using the three criteria from Volberda and Lewin (2003, p. 2131) for co-evolutionary empirical research:

1. The actors involved in the co-evolutions are specified in terms of replicators and interactors. Replicators concern the actors that evolve; they answer the question "what evolves?". Interactors are the actors that make this evolution possible; they answer the question: "how does the evolution take place?".
2. Processes are defined in terms of variation, selection and retention.
3. The outcomes of the co-evolutionary processes are described in terms of "the emergent composition of a collectivity over time" (2003, p. 2131).

### 3.6 CONCLUSIONS

Now that the methods for our data collection and analysis have been explained we can continue with the findings from these data. In Chapter 4 secondary literature and descriptive statistics derived from the database are combined with additional information from interviews with publishers, translators and distributors. The chapter has a descriptive nature and is about the historical developments of comics and the comics industries in general. Chapter 5 focuses on event history analyses based on the database. The sixth Chapter contains the case studies. It has a partly explorative, partly illustrative character. The findings are based on interviews in combination with secondary literature and the database. Finally, in Chapter 7, the main findings from the empirical chapters will be synthesized in a co-evolutionary analysis of the Dutch and Belgian comics industries.



# **CHAPTER 4**

## **COMICS WORLDS AND INDUSTRIES**

### **4.1 INTRODUCTION**

This chapter will provide a concise overview of the history of comics as a medium, as well as of their publishers. In Section 4.2 the history of western comics in general, and of The Netherlands and Belgium in particular, will be outlined, as far as relevant for our objectives. Subsequently Section 4.3 focuses on comics and their publishers in The Netherlands and Belgium. In this section the database that was already introduced in Chapter 3 will be used extensively, mainly in the form of descriptive statistics. In the next chapter, the same database will be used for analytical purposes.

### **4.2 A CONCISE HISTORICAL OVERVIEW OF COMICS AND THEIR PUBLISHERS IN BELGIUM AND THE NETHERLANDS**

#### **4.2.1 Western comics in general**

In the United States as well as in Europe comic strips and stories appeared in magazines and newspapers since the 19<sup>th</sup> century. Very occasionally books were published of popular comics from these media. This began to occur on a more systematic basis in the 1920s and the 1930s, but the comic book industry only really began to boom in the 1940s (Kousemaker and Kousemaker, 1979; Rogers, 1997; Sabin, 1996; Wright, 2001). The publishers got a severe blow in the period of the Cold War, when the world-wide fear for everything that might stir society or be harmful to children and adolescents, resulted in censoring and self censoring measures in the comic book industry that limited the scope of subjects that comics could deal with and the types of comics publishers could produce. A French law from 1949 for instance limited the import of comics from America (and indirectly stimulated import of Belgian comics), and in the United States the Comics Code



introduced in 1954 led to an increasing uniformity of the supply of comics (Crépin and Groensteen; 1999; Nyberg, 1998; Rogers, 1997). In 1948 the Minister of Education of The Netherlands sent a letter to all Dutch schools and local governments, in which he warned teachers to try to prevent the pupils reading comics (Van Gompel and Hendrickx, 1995; Thomassen, 2000).

Events like these strongly influenced the character of comics in many countries well into the 1960s. They limited the legitimacy of comics as an art form and also questioned the legitimacy of the publishers involved (Groensteen, 2000; McAllister, 1990). This lack of legitimacy was also caused by the hybrid nature of comics (hybrid, because words and images are used, Groensteen, 2000; McAllister, 1990).

Indirectly the censoring measures later led to new kinds of comics that consciously went beyond moral impediments, and in the late 1960s this resulted in a wave of underground comics, of which Robert Crumb is the best known creator (Rosenkranz, 2002; Sabin, 1996; Sackmann, 2000). In the 1960s a young generation of comic book creators came out of their relatively anonymous position in the traditional comic book industry and began to demand more artistic freedom from their publishers. Many creators were former readers of comics for children, who remembered the imposed limitations of the medium. Innovations, concerning both form and content, that had their origin partly in the counter-culture (or underground) movement, slowly changed the conventions in a part of the industry.

For a long time comic albums only contained stories pre-published in magazines and newspapers. The comic album based on pre-published series can be called a conventional innovation. The subscriptions to comic magazines began to dwindle in the 1970s, because comics began to lose a part of their traditional readers: children and families. The gradual disappearance of the traditional comic magazines made it more difficult for publishers to predict the sales of the albums. It was no longer attractive to have long term contracts with artists, because of the increase in unpredictability of the market. Overproduction became more important as an instrument to find out which authors would be a hit. Nowadays, publishers will be more attentive to find new talents and will be more careful with long term contracts. To rephrase this in terms of the resource based view: the environment has become uncertain, creative resources have become more important (Miller and Shamsie, 1996).

Since the 1970s new audiences of adolescents and adults could find comic albums of their interest in specialized comics shops. A complete infrastructure around comics had come into being: specialized publishers, retailers, distributors, conventions, awards, self-conscious artists, critics and fan magazines (Brunsmann, 1998; Kousemaker and Kousemaker, 1979; Rogers, 1997; Sabin, 1996).

After the album became accepted as the main medium for comics, there was a starting-point of legitimacy for comics as an independent medium (independent of newspapers and magazines), which led to more radical innovations of comic albums in the late 1970s: author's albums and graphic novels. These innovations were rather unconventional for comics, both with regard to the format<sup>1</sup> as with regard to the content<sup>2</sup>. Some graphic novels have more in common with literary books than with the traditional children's comic. Graphic novels can have a more literary and artistic form and content than their predecessors, which even make them acceptable as a form of art, at least in some countries and on a certain level (Sabin, 1996). The importance of the name of the creator of the graphic novel can be compared with that of a literary author. The best known example of a literary graphic novel is *Maus* by Art Spiegelman, the first comic album that got a Pulitzer Prize (in 1992; Sabin, 1996).

Nevertheless, the idea that comics can be seen as an art form is less generally accepted than for example is the case for film or photography. Knowledge of the enormous variety of comic albums remains to a large degree limited to participants of the niche of the comics. To rephrase this in the words of Art Spiegelman: 'Comics are flying below critical radar' (Spiegelman quoted in Sabin, 1996). Paradoxically, this relatively isolated position is even appreciated by some artists and fans. The idea that comics are not yet part of more institutionalized art worlds gives them a sense of freedom (Brunsmann, 1998; Sabin, 1996).

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<sup>1</sup> The format of the non-formula comic albums is not limited to 32, 48 or 64 pages; they can have a hard cover instead of a paper cover, are more expensive, can be produced in series, but also as a 'one shot': a complete story told in one album. Their sizes can differ, for instance they can have the size of a paperback. The name of the author is clearly mentioned.

<sup>2</sup> The content can be serious, reflective, critical, intellectual, or literary. The drawings can be experimental, art-like.

## 4.2.2 Comics and comics publishers in Belgium and The Netherlands

### 4.2.2.1 Belgium

In Europe, Belgium was one of the first countries in which the comics industries began to prosper after the Second World War, with publishers like Dupuis, Casterman and Lombard in Wallonia and Standaard in Flanders. Dupuis and Casterman already published magazines and books before they entered the comics market, Lombard published comics from the start of its existence.

Hergé, probably the most influential European comic-artist, started to draw *Tintin* in 1929 in a catholic youth magazine. The first *Tintin* album appeared in 1930. Since 1934 the *Tintin* albums were published by Casterman. They became a huge success, first in Belgium, but very soon also in France, after the war in The Netherlands many other countries. Hergé became a source of inspiration for many other young artists. In 1946 Lombard approached Hergé to start a comics magazine around *Tintin*, together with other comics. *Tintin* magazine was published in both Belgian languages, French and Dutch (the Dutch version was named *Kuifje*), from the start.

Its main competitor was *Spirou*, a comic magazine published by Dupuis already since 1938, also in French and Dutch language versions (the Dutch version of *Spirou* was *Robbedoes*). In spite of censoring measures that were a consequence of the French youth law from 1949 (mentioned in the previous subsection), this measure enabled Dupuis, Casterman and Lombard to enter the markets in France. American comics were banned from the French market, and French publishers had no substantial supply of comics yet. The Belgian publishers jumped into that gap and introduced the formula of prepublication in a magazine, and publication in album format afterwards, which proved to be very successful. The fact that their market included three countries at the same time (Belgium, France and The Netherlands) contributed to this success. Only after French publisher Dargaud launched the magazine *Pilote* in 1959, with as its most popular comic *Asterix* by Goscinny and Uderzo, the market share of the Belgian publishers began to decrease. Nevertheless, for Wallonia comics still are important export products.<sup>1</sup>

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<sup>1</sup> An average 65% of the Wallonian comics production is meant for export. 38% of the turnover of all Wallonian books is derived from the sales of comics (Lodewyckx, 1998).

The best known comic from Flanders is *Suske & Wiske* by Willy Vandersteen, published by Standaard Uitgeverij, originally a publisher of a newspaper in which this comic was pre-published. Since decades four new *Suske & Wiske* albums appear every year. Each new album sells approximately 150,000 copies: 90,000 in The Netherlands, 50,000 in Flanders, and 10,000 (translated) albums in Wallonia (De Jonge, 2010).<sup>1</sup> Quite remarkable is the fact that this comic has become more popular in The Netherlands than in Flanders. Another popular series from the Vandersteen studios was *Bessy*, which during its appearance was very well sold in Germany.<sup>2</sup> Other Flemish bestselling comics series (a.o. *F.C. De Kampioenen*, *Kiekeboe*, *Jommeke*) have never become successful on foreign markets.

Attempts to introduce Flemish comic magazines only had a modest success; pre-publication in newspapers seemed the best way to guarantee success for the Flemish album.

The Golden Age of the Belgian publishers was in the 1940s and 1950s. From the 1960s France became the capital country of the European comics. The Belgian publishers lost their independence, after a series of mergers and acquisitions. In the late 1990s Casterman was acquired by the French media conglomerate Flammation. Lombard became part of Média Participations, another French media conglomerate, which also owned Dargaud. Standaard took over comics from smaller Flemish publishers, and on its own turn became part of the Belgian-Dutch media conglomerate PCM. In 2010 Standaard was acquired by another Dutch publishing conglomerate: WPG. In 2004 Dupuis was acquired by Média Participations, which is now Europe's largest publisher of comics.

Since the late 1970s Dupuis, Casterman and Lombard have diversified their supply of comic albums and nowadays they publish comics in many different genres and formats for children and families, but also for adults. Standaard has always addressed Flemish families and children with their comics. Of Europe's four best selling

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<sup>1</sup> Although these figures are impressive, ten years ago the numbers were still much higher: 400,000 copies of each new album were sold, of which 360,000 in The Netherlands and Flanders and 40,000 on the Walloon market.

<sup>2</sup> *Bessy* was published as a magazine in Germany, and a selected number of stories were published as albums in Belgium. The accumulated sales of albums (15 million) and magazines (135 million) amount to 140 million copies (Lodewyckx, 1998, p. 56).

comic album series, three are still of Belgian origin.<sup>1</sup> Translated comics from Wallonia and from France are popular in Flanders, but originally Flemish comics are hardly read in Wallonia.

Walloon and Flemish comic albums share characteristics, but there are also differences.<sup>2</sup> The typical Walloon album is pre-published in a magazine; Flemish comics are often pre-published in newspapers. For the magazine stories more time is available to create the comics and this has led to a higher (average) quality of the art of the Walloon comics. The most popular Flemish comics are comical stories in which members of a family have the leading role. Walloon comics are often genre-comics (adventure, western, fantasy, humour), but hardly ever a family comic. The Flemish and Walloon albums have different properties that are summarized in Table 4.1.

In the 1990s and the first decennium of the 21<sup>st</sup> century new forms of comics were introduced by young French artists that were united in the idealistic publishing company L'Association.

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<sup>1</sup> Top Four of Europe's best selling comic albums in 2004:

1. *Asterix*: French, by Goscinny and Uderzo and since 1977 by Uderzo, started in 1959, published by Dargaud, since 1998 by Albert-René/Hachette, 31 album titles, 320 million albums sold by 2004 (*Capital*, 2004, p. 52).
2. *Lucky Luke*: Belgian, by Morris and others, started in 1947, published by Dupuis, Dargaud and since 1991 by Lucky Comics (since 2004 these three publishers are a part of Média Participations), 72 album titles, 200 million albums sold by 2004 (*Capital*, 2004, p. 54).
3. *Tintin*: Belgian, by Hergé, started in 1929, published by Casterman since 1934, 24 album titles, 193 million albums sold by 2004 (*Capital*, 2004, p. 55).
4. *Suske & Wiske* (Bob & Bobette/Willy & Wanda): Belgian, by Vandersteen and Vandersteen Studios, started in 1945, published by Standaard, 185 album titles in 1997 (Matla, 1998), 128 million albums sold by 1997 (Lodewyckx, 1998, p. 56; estimated sales by 2004: 130 million albums)

No other European album series sold more than 100 million albums in total. *Tintin* is the only series of these four that was not continued after the death of its creator (Hergé died in 1983). The other series were continued after the death of (one of) their creator(s) by co-creators (*Asterix*) or new generations of artists (*Suske & Wiske*, *Lucky Luke*).

<sup>2</sup> Sources for the comparison between Flemish and Walloon comics: Dierick and Lefèvre (1996) and Lefèvre (2005).

**Table 4.1 The main differences between traditional francophone and Flemish comic albums**

production	Walloon (and French)	Flemish
cover	hardcover (cardboard)	softcover
pages	48	32 or 48
average price [in 2005, RdV]	10 à 13 euros	4 à 6 euros
frequency of appearance in a year	1 à 2 albums	3 à 5 albums
length of series	varies (less than 80 albums)	very long (more than 100 albums)

*source: Lefèvre, 2005, p. 17 (translated from French)*

Artists in other countries were inspired and started their own, independent publishing companies. In Belgium Frémok was the most avantgardist of the new publishers.

In Flanders Standaard almost had conquered a monopoly position as a publisher of Flemish comics, but now there was an alternative in the form of the independent Flemish publishers Bries and Oogachtend. These specialized in artistic, innovative comics and were supported financially by the Flemish government, just as the comics by Frémok were supported by the Walloon government.

#### **4.2.2.2 The Netherlands**

Just like in Flanders, Dutch comics were pre-published in newspapers and magazines, and published afterwards in several formats, by a number of publishers.

After 1945 and until the early 1950s the Toonder studios, started during the war by the most influential Dutch comics artist Marten Toonder, were important exporters of Dutch comics. Toonder's comics series were published in newspapers and magazines in many European countries, including Belgium, France, the UK, Germany and Scandinavia. But this prosperity disappeared in the course of the

1950s, when Dutch comics lost their original appeal to other nations. This was mainly caused by the format that the Toonder studios continued to use for their export comics: a division between text and images, instead of balloons inside the images.

The balloon-comic, made popular in Europe by a.o. *Tintin*, became the international standard format for comics after the war. The Toonder studios did nothing to change their format, and lost the competition with balloon-comics. Only in their home-market the Toonder comics survived, mainly because of the exceptional role of Marten Toonder himself in The Netherlands.

Quite remarkable is the fact that the most popular newspaper comics by Marten Toonder, *Tom Poes* and *Ollie B. Bommel* were published as paperbacks by a literary publisher, De Bezige Bij (one of the largest literary publishers in The Netherlands).

Comic albums appeared on a more regular basis since the 1960s, especially from several large Dutch magazine and newspaper publishers who merged in VNU ('Verenigde Nederlandse Uitgeversmaatschappijen': United Dutch Publishing Companies) in 1964. Since then VNU was the largest publisher on the Dutch comics market. VNU introduced licensed Belgian and French comics to the Dutch market and copied the formula of pre-publishing in magazines and publishing in albums afterwards. VNU magazines like *Sjors*, *Pep*, *Donald Duck* and *Tina* inspired a young generation of Dutch artists, who got the opportunity to publish their own work as well. In the late 1990s VNU gradually withdrew from the comics niche. Of the Dutch comic magazines *Donald Duck*, licensed from the Disney Corporation, and *Tina* are the only ones that have survived. One of their former imprints, Big Balloon, became an independent comics publisher.

Other Dutch publishers of comic albums survive partly by specializing in series for specific audiences, and partly by exporting their comics to Flanders. Artistic comics are published by among others Oog & Blik and Sherpa. Apart from these Dutch publishers, the Dutch comics market is served by the publishers Standaard, Dupuis, Casterman, Dargaud, Lombard, Glénat and several smaller Belgian and French publishers.

Whereas until the 1960s the production of originally Dutch comics exceeded the supply of translated comics, this situation has been reversed since then. The num-

ber of imported and translated comics in the Netherlands is now far higher than that of exported comics. Of all the approximately 7,500 Dutch-language comic albums that appeared on the Dutch market in the period 1998-2008, only 13% was of Dutch origin. A comparable percentage was from Flanders, so also originally in Dutch, but the majority was translated, mostly from French (source: author's database). In comparison: of all Dutch books 75% is originally Dutch (Heilbron, 1995; most recent source).

### **4.3 DYNAMICS OF THE POPULATION OF DUTCH LANGUAGE COMICS PRODUCERS IN GENERAL**

#### **4.3.1 Introduction**

In this section the *SDCN-database* will be used to describe the developments in the population of Dutch language comics publishers and of their products. After a general overview, the productivity within the population will be discussed, not only with regard to the publishers, but also to the artists and scenarists involved in the album production. After World War Two the comics market grew explosively and that is the reason why especially the post-war period will get attention. I will address the concentration within the population (expressed with the term C4), the country of origin of the publishers and of the comics that they produced.

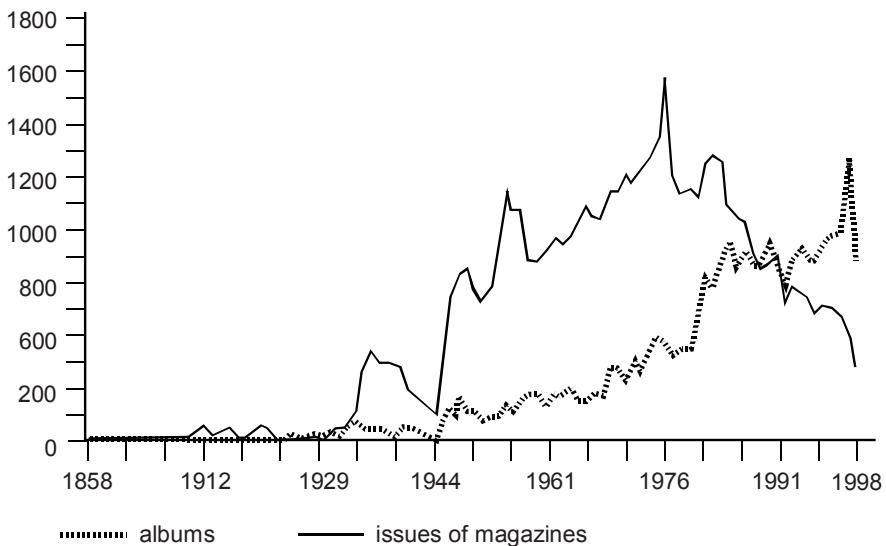
#### **4.3.2 Overview of comics publications and their publishers**

Figure 4.1 shows all comics (albums and magazines) that have been produced in the Dutch language, from 1858, when the first album was published, until 1998: the end of the period that the database covers. During the 19<sup>th</sup> century comic albums were produced very sporadically, as can be seen in the graph. Since the 1920s comic magazines became popular very rapidly. Many of them were still attachments to general magazines and newspapers. In the same period albums were produced more regularly, and these numbers increased in the 1930s. The Second World War put an abrupt end to this growth (although comics did appear during the war), but it continued immediately, and in a much faster pace, after the war had ended.

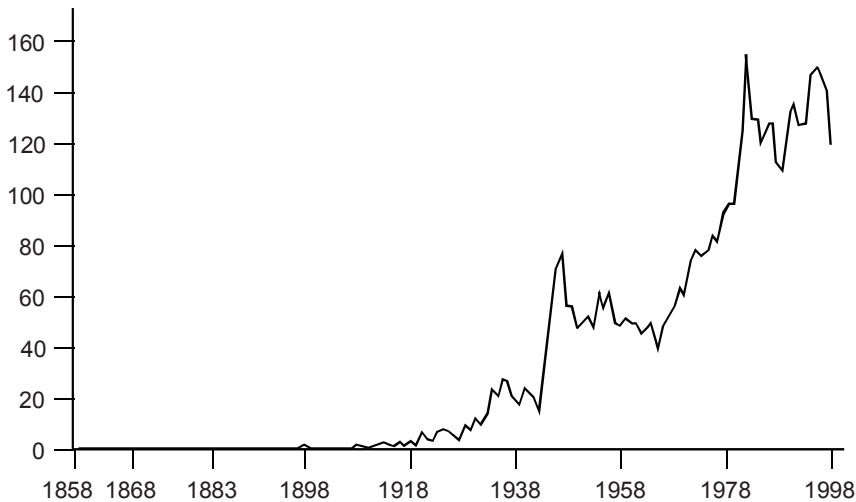


After 1945 the format of the comic albums gradually became more important for publishers. Especially those albums that reproduced the most popular comics from newspapers and magazines sold very well and because of the double source of income, publishers of magazines produced album series far more systematically than before the war. The Belgian publishers Dupuis and somewhat later Lombard profited from this formula, especially because they published in both French and Dutch, as a consequence of their Belgian origin, and could sell their magazines and albums in all countries where one of these languages was spoken. Comic magazines became independent of the magazines of which they were appendices before, and new magazines appeared that were independent from the beginning. The first publishers who specialized in comics from their founding (*de novo* publishers) entered the market. Lombard, publisher of the *Tintin* magazine, and of album series derived from that magazine, was the most productive of them during a long time.

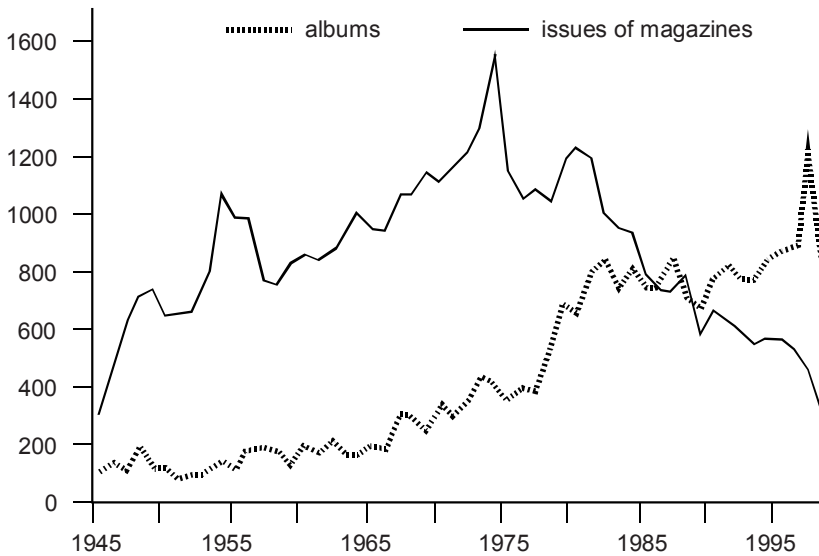
**Figure 4.1 Comics published in 1858-1998, by type: albums and magazines**



During the 1940s and 1950s the number of comic magazines continued to grow. A few decades later, in the 1970s and especially in the 1980s, the magazines lost ground to the albums: the market became too fragmented for most magazines, who traditionally focused on a general audience of children (and their parents) or teenagers. Large numbers of comic albums in many genres (romance, fantasy, science fiction, historic comics, western, adventure, erotic, experimental ('arty'))

**Figure 4.2 Publishers of comics 1858-1998**

and underground comics) for more specific target groups were released, often in album series format. Since 1989 the total number of albums outnumbers the total numbers of issues of magazines every year, as can be seen more clearly in Figure 4.3. In the last decades of the 20<sup>th</sup> century, many albums appeared on the market that had not been pre-published in Dutch or Belgian magazines (although a number of them had been pre-published in French or American magazines). Figure 4.2 shows the dynamics in the number of publishers involved in the production of comics - albums and magazines together. The Figure shows the same developments as the first one: a gradual growth in the first decades of the 20<sup>th</sup> century, a stand-still during the war and a strong and steep increase in the years immediately after the war. The number of publishers decline a little during the 1950s and early 1960s, but the whole sector revives and grows again after 1967, with a second steep increase between 1977 and 1982. Since that year the number of publishers fluctuates every year, with ups and downs, but has not fallen back again to the level of the early 1960s.

**Figure 4.3 Comic albums and magazines 1945-1998**

### 4.3.3 Productivity of publishers

The most productive publishers in the whole period covered by the database are rendered by publication format in Tables 4.2 and 4.3. As the tables show, VNU (and the many publishers that have become part of VNU) is the most productive publisher in the Dutch language area, both of albums and of magazines. Five publishers are on both Top 10s (VNU, Media Participations, Dupuis, Semic Press-Junior Press, Het Volk). The other five are more specialized into either albums or magazines.

Table 4.3 might suggest that the production of the album publishers in general is high, but in fact there are many publishers who have published only a very small number of albums. 575 publishers (44.2% of the population) even published no more than one album. Table 4.4 shows how many publishers published how many albums.

**Table 4.2 Top 10 publishers of magazines in the database**

<b>publisher (country of origin)</b>	<b>issues of magazines</b>	<b>share total magazine issues production (N = 48,987)</b>
1. VNU (NI)*	9,304	19.0%
2. Het Volk (FI)	3,479	7.1%
3. Dupuis (W)	3,339	6.8%
4. Semic Press- Junior Press (NI –Sw)*	3,142	6.4%
7. Media Participations (Fr-W)*	2,946	6.0%
6. Classics (NI)*	2,901	5.9%
7. Ons Volk (FI)	2,462	5.0%
8. Nooit Gedacht (NI)	1,705	3.5%
9. De Schorpioen (FI)	1,669	3.4%
10. Altiora (Averbode) (FI)	1,128	2.3%

Magazines made in co-production between two or more publishers, were divided through the number of publishers (not counted twice).

\* These numbers are sums of the magazine production of the individual publishers that have become parts of conglomerates. E.g. VNU includes the comics of De Geïllustreerde Pers, De Spaarnestad, Oberon, Malmberg, Big Balloon etc., and Media Participations includes the production of Lombard and Dargaud. Dupuis was also acquired by Media Participations, but that was in 2004, after the period that the database covers, and therefore Dupuis is still mentioned under its own name here.

The population is divided into five subcategories, by volume of production. The average production of the 1,301 publishers is 20 albums (without the albums of which the publisher is unknown). This is (somewhat more than) ten times as low as the 209 magazine issues that are the average production of the 234 magazine publishers (again, without the magazines of which the publisher is unknown).

The number of magazine publishers with a minimum production of 1 is also much smaller than that of the album producers: 18 magazine publishers (7.7% of the population) just published one issue, and as a consequence, also just one magazine title.

Table 4.3 Top 10 publishers of albums in the database

<b>publisher (country of origin)</b>	<b>albums</b>	<b>share total album production (N= 26,671)</b>
1. VNU (NI)*	2,743	10.3%
2. Standaard (FI)	2,619	9.8%
3. Media Participations (F/W)*	2,207	8.3%
4. Dupuis (W)	2,112	7.9%
5. Arboris (NI)	1,087	4.1%
6. Casterman (W)	956	3.6%
7. Het Volk (FI)	808	3.0%
8. Talent (FI)	684	2.6%
9. Semic Press - Junior Press (NI - Sw)*	646	2.4%
10. Loempia (FI)	406	1.5%

Albums made in co-production between two or more publishers, were divided through the number of publishers (not counted twice).

\* These numbers are sums of the album production of the individual publishers that have become part of conglomerates (see asterisk at Table 4.2).

This difference can be explained by the investments and preparations that most publishers make before releasing the first issue of a magazine. In general these would lead to the publication of at least several other issues of the same title, before production would stop, in case of a lack of interest among the audience, or because of internal complications. Most publishers with a production of one or two magazine issues are (very) small. Nevertheless larger publishers have also published magazines that only lasted for one or two issues. An example is Oberon, part of VNU, which published a number '0'-issue of the innovative comic magazine *Baberiba* in 1974. This issue was meant to test its market potential. Probably the sales were too low, for Oberon decided to stop with *Baberiba* after this first attempt. Later this issue became a much looked for collector's item, which explains its (collector's) value of € 28,- (fl 60,-) in Matla (1998).

**Table 4.4 Publishers of albums ('real' publishers and 'hit & run' publishers) in five groups, by volume of album production**

album production	number of publishers (N = 1,301)	percentage of whole population	cumulative percentage of population
1	575	44.2%	44.2%
2 - 10	509	39.1%	83.3%
11 - 50	152	11.7%	95.0%
51 - 100	25	1.9%	96.9%
more than 100	40	3.1%	100.0%

Table 4.4 includes the 927 'real' publishers as well as the 374 'hit & run' publishers (see Chapter 3). Exclusion of the hit & run category gives us a more valid overview of the publishers that actually were involved in the competition within the comics niche. Therefore Table 4.5 shows the same data, but this time without the hit & run organizations. Although the categories of publishers with only a few publications are now smaller than within the whole population, it appears that among these 'real' publishers there are also many whom have produced a very modest number of albums. Only 40 publishers (4.3% of the population), among them those in the Top 10, have published more than 100 albums. This is the core of the comics industry in The Netherlands and Belgium. The average production of the 927 'real' publishers is 27.2 albums (without the albums of which the publisher is unknown).

#### **4.3.4 Productivity of artists and scenarists**

In total 3,249 people (or studios) were involved in either/or the drawings or the stories for the albums. 2,145 artists were involved in the drawings for the albums, and 2,327 scenarists were responsible for the stories. 1,223 people draw and write comics. There are also 922 specialized artists and 1,104 specialized scenarists, who only draw or write. Of 2,567 albums in the database (9.6% of all the albums) the names of the artists and scenarists (individuals or collectives) are unknown. Of an additional 111 albums the artist is known, but the scenarist remains anonymous.

**Table 4.5 'Real' publishers (whole population without 'hit & run' publishers) in five groups, by volume of album production**

album production	number of 'real' publishers (N= 927)	percentage of population	cumulative percentage of population
1	353	38.1%	38.1%
2 - 10	374	40.3%	78.4%
11 - 50	137	14.8%	93.2%
51 - 100	23	2.5%	95.7%
more than 100	40	4.3%	100.0%

The ten most productive artists and scenarists are mentioned in Tables 4.6 and 4.7 (NB: the numbers mentioned in the tables include the many reprints of popular albums, often in varying formats). If we look at the artists (Table 4.6) Willy Vandersteen, the godfather of Flemish comics, but also very popular in The Netherlands because of *Suske & Wiske*, has the largest share in all albums. In the second position is Marten Toonder, Vandersteen's Dutch counterpart. Both Vandersteen and Toonder had their own studios (the Vandersteen Studios are still active these days, the Toonder studios only still exist as a name) and collaborated with many other artists in their comics series, although often their names are the only ones mentioned on the cover of the albums. This was a conscious, marketing related choice: their names functioned as a brand. The same can be said of Walt Disney. In the Top 10, the Disney Studios appear to be the only non-European collective, but although the American Disney company owns the rights, many of their comics are in fact created in European countries like The Netherlands, Denmark and Italy.

If we compare Table 4.6 with Table 4.7 it appears that the first five names in the Top 10s of scenarists and artists are exactly the same. Hergé, creator of *Tintin/-Kuifje*, is the sixth artist present on both lists.

Table 4.6 Top 10 of artists with the largest number of albums in the database

artist (real name; country of origin)	best known series in The Netherlands and Belgium	number of albums in database
1. Willy Vandersteen (Fl)	<i>Suske &amp; Wiske</i>	1,764
2. Marten Toonder (Nl)	<i>Heer Bommel en Tom Poes</i>	738
3. Marc Sleen (Marc Neels; Fl)	<i>Nero &amp; Co</i>	651
4. Walt Disney Studios (USA and other countries)	<i>Donald Duck</i>	495
5. Jef Nys (Fl)	<i>Jommeke</i>	424
6. Hergé (Georges Remi; W)	<i>Kuifje</i>	273
7. Hans Georg Kresse (Nl)	<i>Eric de Noorman</i>	258
8. Merho (Robert Merhottein; Fl)	<i>Kiekeboe</i>	247
9. Albert Uderzo (Fr)	<i>Asterix</i>	236
10. Tibet (Gilbert Gascard; Fr)	<i>Chick Bill; Rik Ringers</i>	206

The numbers include reprints, often in varying formats.

Most of the albums of Vandersteen, Toonder, Sleen and Nijs were originally pre-published in newspapers, just like those of Kresse and Merho. Most comics from the other artists and scenarists in both lists were pre-published in magazines: in the case of Disney in licensed magazines like *Donald Duck*, in the other cases originally in *Spirou/Robbedoes*, *Tintin/Kuifje*, and the French magazine *Pilote*. The Dutch versions of the *Pilote* comics were pre-published in Dutch magazines like *Pep* and later *Eppo*. Cauvin (no. 6 in the scenarist Top 10), Greg (no. 7), Goscinny (no. 8) and Charlier (no. 10) are/were specialized in scenario writing. René Goscinny alone is responsible for many stories of two of Europe's best sold comics: *Asterix* (drawn by Uderzo) and *Lucky Luke* (a.o. drawn by Morris - pseudonym of Maurice de Bèvere). Greg is the only scenarist on this list who has not only written for many others, but who has also drawn and written his own comics.



**Table 4.7 Top 10 of scenarists with the largest number of albums in the database**

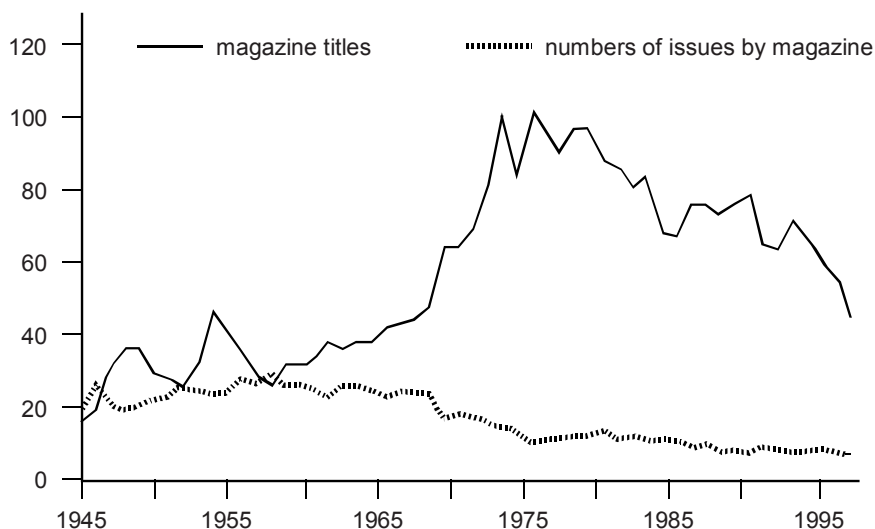
	<b>scenarist (real name; country of origin)</b>	<b>best known series in The Netherlands and Belgium</b>	<b>number of albums in database</b>
1.	Willy Vandersteen (Fl)	<i>Suske &amp; Wiske</i>	1,775
2.	Marten Toonder (Nl)	<i>Heer Bommel en Tom Poes</i>	721
3.	Marc Sleen (Marc Neels; Fl)	<i>Nero &amp; Co</i>	649
4.	Walt Disney Studios (USA and other countries)	<i>Donald Duck</i>	489
5.	Jef Nys (Fl)	<i>Jommeke</i>	423
6.	Raoul Cauvin (W)	<i>De Blauwbloezen; Sammy</i>	308
7.	Greg (Michel Regnier; Fr)	<i>Olivier Blunder; Roze Bottel; Comanche; Bruno Brazil; Chick Bill, and many others</i>	301
8.	René Goscinny (Fr)	<i>Asterix, Lucky Luke</i>	299
9.	Hergé (Georges Remi; W)	<i>Kuifje</i>	286
10.	Jean-Michel Charlier (W)	<i>Blueberry; Buck Danny; Roodbaard; Tanguy en Laverdure</i>	286

The numbers include reprints, often in varying formats.

#### 4.3.5 Comics and their publishers in the period 1945-1998

If we zoom in on the period after World War Two, we can see in more detail that the number of magazines increases very fast after the war has ended, and that the numbers of albums produced also increase, but at a slower pace. The album production surmounts the number of magazines in the course of the 1980s (Figure 4.3). The comic magazine production has dropped dramatically since then. Specialized comics magazines are far less popular than in the decades before. Other media and other leisure possibilities take over their position. Some magazine titles that

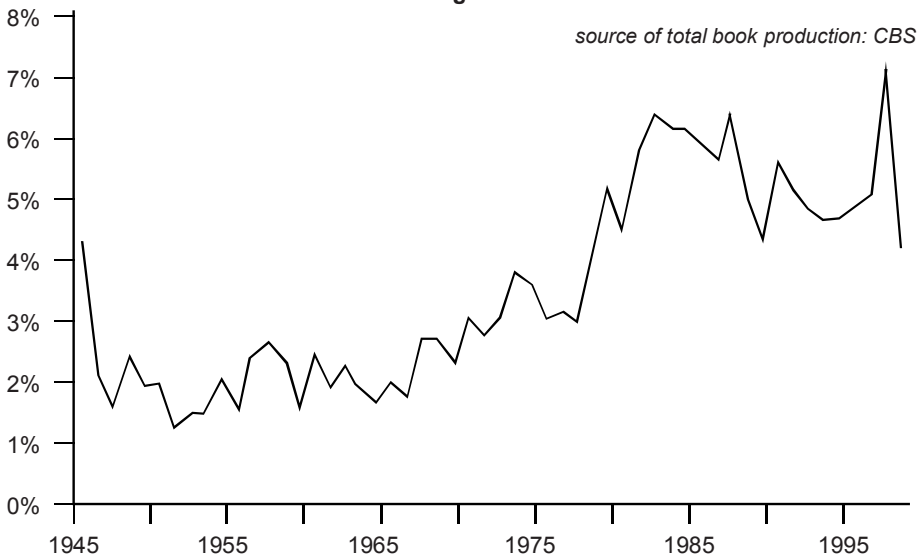
**Figure 4.4 Numbers of magazine titles compared with the average number of magazine issues by magazine 1945-1998**



have been part of the Dutch and/or Belgian popular culture since decades, still exist (*Donald Duck*, *Tina*, *Robbedoes*, *Kuiffe* - the latter two also disappeared from the Dutch language market in later years). Nevertheless, new magazines are introduced almost every year. Figure 4.4 compares the dynamics in magazine titles with the average number of issues by magazine. The number of magazine titles increases since the second half of the 1960s, just as the number of albums, but at the same time the average number of issues becomes smaller. Since 1980 the number of magazine titles begins to decrease also, and the average number of issues by magazine continues to decrease: from more than an average twenty issues by magazine to less than half of this. The change in the average number of issues by magazine can be explained by the disappearance of many weekly magazines, and their replacement by bi-weekly, monthly and quarterly comic magazines. This development makes clear that since 1980 the magazines have become less popular: weekly magazines are expensive, and only profitable if there are scale advantages. The market for magazines has become fragmented, and therefore scale advantages are less easy to realize. In the 1970s it still was possible, but after that the market became too small.

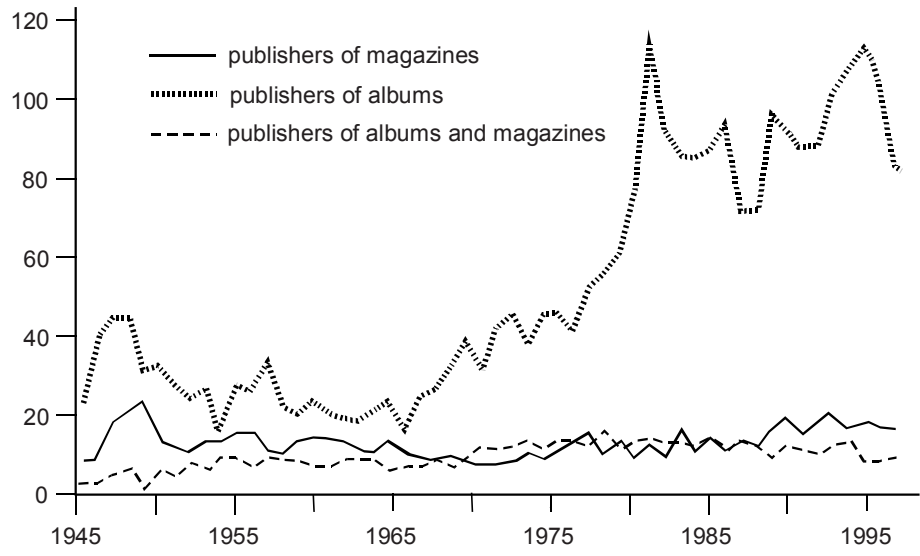
To find out whether the dynamics in the comic album production are a phenomenon in its own right, or whether they are related to a more general development, data about the production of books in general were obtained from the CBS. Indeed the numbers of all Dutch language books have increased since 1945, but the increase of comic albums is stronger, as is shown in Figure 4.5. The share of comic album production in the total production of books has increased from around 2% in the 1950s and early 1960s to more than 6% in the 1980s and 1990s. Still a modest share, but a strong growth nevertheless.

**Figure 4.5 Share of comic album production in total book production in The Netherlands and Belgium 1945-1998**

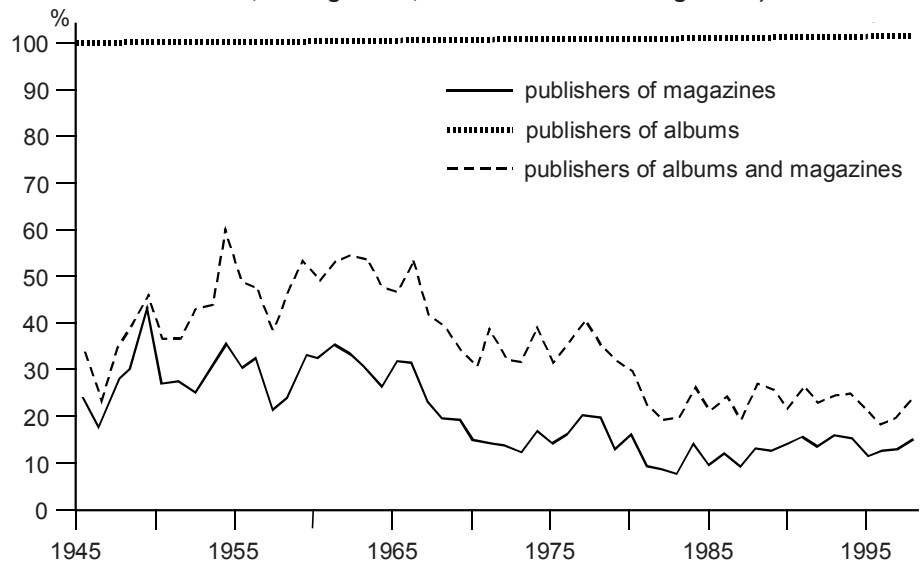


The database includes information that enables us to make a distinction between three categories of publishers: publishers of only albums, of only magazines, and of both magazines and albums. Figure 4.6 shows the absolute numbers of publishers by year, and Figure 4.7 shows how the proportions between these three categories change over the years. Already in 1945 the number of publishers that specialize in albums is remarkably high. This decreases again, but after 1966 it grows annually. Since 1980 75% of the population of comics publishers only produces albums. The proportions of both other categories gradually become smaller.

**Figure 4.6 Comics publishers in three categories: publishers of albums, of magazines and of both albums and magazines 1945-1998**



**Figure 4.7 Proportions of the three categories of publishers (publishers of albums, of magazines, and of albums and magazines)**



Although Figures 4.6 and 4.7 suggest that specialized publishers of comic albums are more important for the album production than generalist publishers, who produce both albums and magazines, the share of the specialists in the production of albums is smaller than one might expect.

**Figure 4.8 Albums produced by category of publisher: by publishers of only albums, and by publishers of albums as well as magazines**

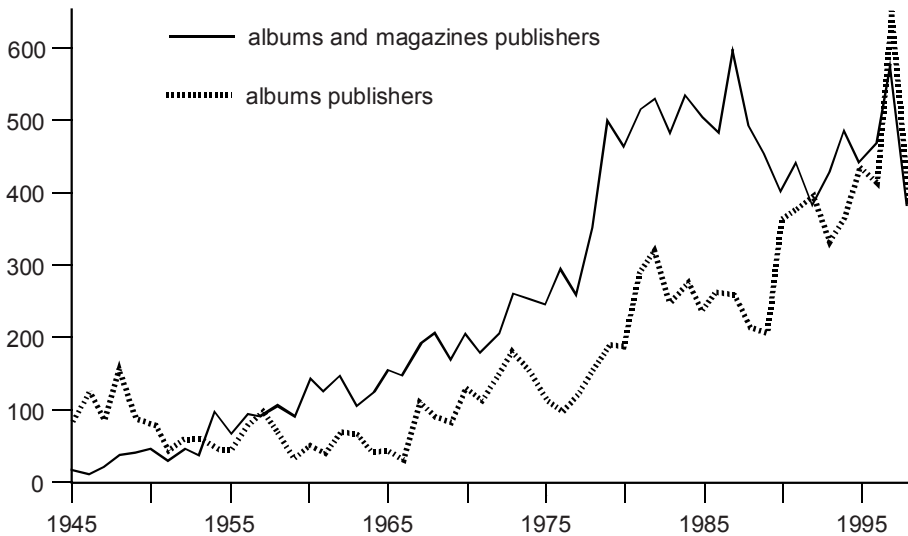
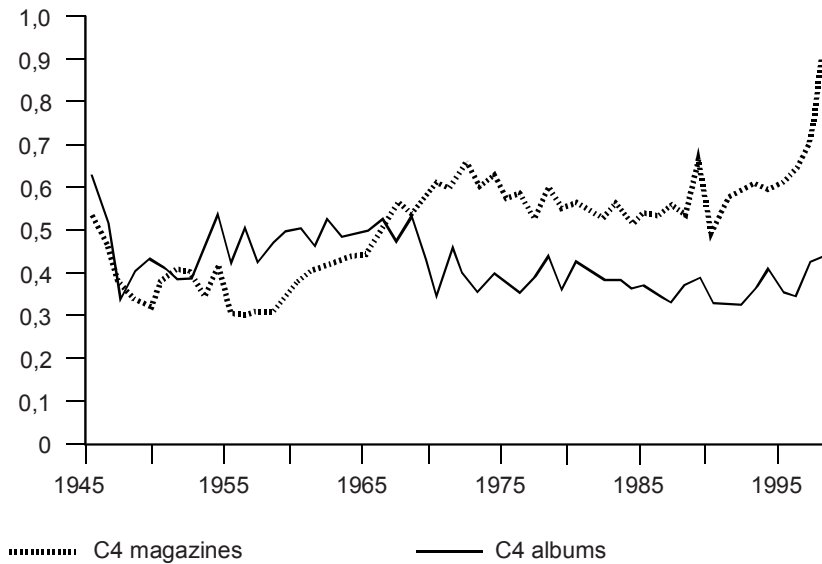


Figure 4.8 shows us the shares of both categories of publishers in the production of comic albums. Only since the 1990s the share of the specialist ‘only album’ publishers outnumbers that of the ‘magazine/album’ category. Before 1990 the larger comics publishers who publish albums as well as magazines have contributed more to the growth of the album production than the specialists. Thus, for a long time the organizations that produced most comic albums had at least a part of their roots in magazines, and were not specialized in producing albums or books.

Figure 4.9 shows the C4 share in the total album and magazine production. Immediately after the war just a small number of album publishers were active, which explains why the C4 share is so high in that year. After that more publishers enter the market and the degree of market concentration by the four most productive ones decreases. In the period 1955-1970 the average C4 share in the album market is 50%. Since 1970 this ratio varies between 30% and 45%.

According to resource partitioning theory the concentration level of generalists in an industry is related to the entry of specialists, especially in the case of scale industries that have a high homogeneity of resources for generalists (Boone and Van Witteloostuijn 1995; Boone *et al.*, 2002). However, specialists can only thrive if there is minimum level of heterogeneity in their resources (Boone *et al.*, 2002).

**Figure 4.9 Share of C4 publishers in album and magazines production 1945-1998**



The album publishers belonging to the C4 are mainly (large, *de alio*) generalists that have a rather uniform audience, existing of (families with) children. They typically belong to that part of the industry that needs scale advantages. The specialists have more diversified audiences: not only children and families, but also adolescents, adults, and buyers of specific genres. They belong to a part of the industry that hovers between Type I and Type II, scale and scope. The conditions for a relationship between C4 and the entry of specialists are met in the album market. From the descriptive statistics presented here the relationship appears to be there. In the next chapter this assumption will be tested statistically.

The comic magazine publishers show different developments. During the first decades after the war the C4 share in magazine production is lower than that of albums, but since 1967 it is higher. This evolvement towards a concentrated niche was already predicted by earlier knowledge about Type I industries: magazine pro-

ducers are characterized by high setup costs (Boone and Van Witteloostuijn, 1995, p. 279). Whereas the album niche contains resource spaces for generalists and specialists, the magazine niche meets only one of the conditions for a relationship between C4 and the entry of specialists. By far the most comic magazines address (families with) children. These form the homogeneous resources that the generalists need, in order to realize scale advantages. But the niche lacks heterogeneity of resources for specialists. Adolescents and adults prefer to read albums instead of magazines. This has made the magazine market less fragmented than the album market, and less attractive to specialists.

Combining the insights from the data visualized in the Figures 4.1 to 4.9 one could make a rough division of the postwar comics production into three era's: the age of the magazines and albums derived from magazines/newspapers (1945-1965), a transition age in which comics magazines are still important, and albums become more and more important as a medium for comics (1965-1990), and the age of the comic album (1990-1998).

Note that if for the division 'album' or 'magazine' the criteria of Matla (1998) were used instead of the criteria of the compilers of the *SDCN-database*, American style comics (Matla's 'magazine-albums') and 'mini-comics' that are now categorized as magazines, would be labeled as albums instead. The number of these publications increased in the 1960s and 1970s, and decreased again in the 1980s (just as other, regular magazine titles). If these comics were categorized as albums instead, the total number of albums would have surpassed the number of magazines already since the 1970s, and the 'era of the album' would have started much earlier.

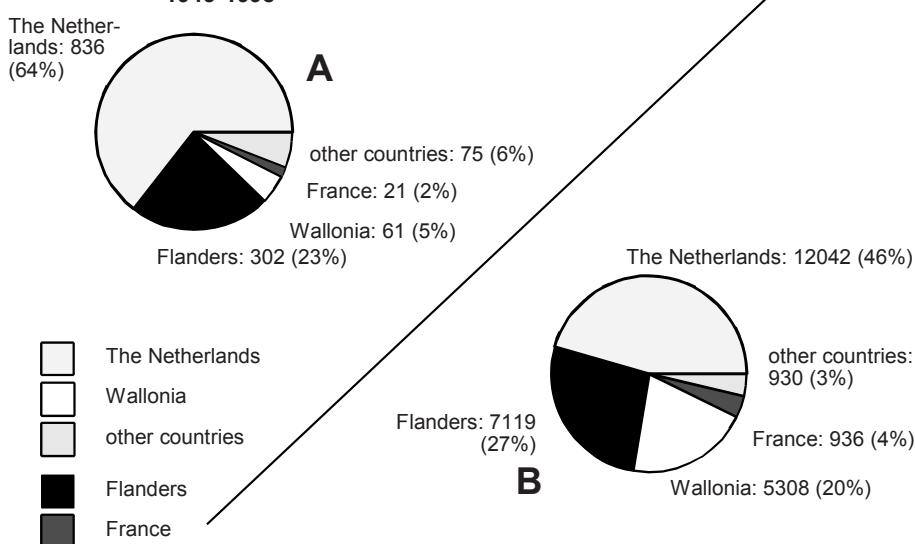
#### **4.3.6 Comic album publishers and country of origin 1945-1995**

One of our research objectives is to compare the dynamics of Dutch and Belgian comics publishers. To make such a comparison we have to know where the publishers are from. Information about the country of origin of the publishers was not in the database itself. The sources mentioned in Section 3.2 were used to find out which nationality the publishers had.

If we look at the proportions of the nationalities of the publishers in the whole period (Figure 4.10 A), we see that Dutch publishers are the largest group in the

population (64% of all publishers), and that there are only a few foreign publishers (that is: not Dutch and not Belgian) active in the Dutch language comics world. The Flemish publishers have a share of 23% in the whole population, whereas the share of the Wallonian publishers is much smaller (5%). One would not expect this, because historically the Wallonian publishers have been very important for the development of European comics, as we saw in the previous chapter. However, only a small number of publishers, like Dupuis, Lombard and Casterman, played an important role in these developments, and produced large numbers of album series, during a long period.

**Figures 4.10 A and B. Shares of countries of origin of publishers in total population (A) and in total album production (B) during the period 1945-1998**



This becomes visible in Figure 4.10 B, which shows the proportions of the album production by the publishers' country of origin. Although Wallonian publishers only have a share of 5% of the population, they were responsible for 20% of all albums in the database. They published French and Dutch language versions at the same time (although the majority of them originally were in French, because the artists were Wallonian or French). The albums were sold in all the countries where one of these languages was spoken, so the market potential was huge. In certain periods albums from Wallonian publishers were licensed to Dutch publishers for the Dutch market. An example is the collaboration between Lombard (Belgian) with Van der Hout & Co and with Helmond (Dutch) in the 1960s and 1970s. Lombard



published French and Flemish albums for the Belgian market, and Van der Hout & Co and later Helmond published Dutch translations for The Netherlands. As a consequence the share of Wallonian albums in the total production would be even higher if the licensed albums would be included in the counting. The trade between French language and Dutch language comics was and still is mainly a one-way traffic: many comics have been translated from French (either from Wallonia or France), whereas a very modest number of Dutch language comics were translated into French.

Two of the larger Belgian publishers had an office in The Netherlands for a number of years. Dupuis had an office in Den Haag and later in Sittard, and Casterman had an office in Dronten. Both affiliates have disappeared (in respectively the early and the late 1990s). Internal reorganizations, as a consequence of acquisitions by other publishers, had led to a focus on more efficiency. The Dutch market had become too small for a separate office in The Netherlands. The Flemish and Dutch market is since then seen as one whole, and is served by Dutch language departments in the Belgian headquarters of both publishers.

The largest Flemish comics publisher Standaard published a Flemish and a Dutch version of their most popular album series *Suske & Wiske* for the Dutch language area. After 1964 there were no separate editions for the Flemish and Dutch market anymore, because of the fact that Dutch became accepted as the standard language in Flanders for written texts.

The proportion of Dutch publishers in the album production is much smaller than their share in the population would suggest (64% of the population and 46% of the album production). The proportion of Dutch and Belgian publishers in the album production is almost even: 46% of the albums are from Dutch publishers, and 47% in total from Belgian. The Flemish publishers have a share of 27% in the whole album production, and the Wallonian publishers 20%.

Among the foreign publishers, French publishers are the largest group. However, their share in the total population and album production is quite modest. This can be explained by the fact that most French publishers whose publications are available in the Dutch language countries, have licensed them to Dutch and Flemish publishers. Only a few French publishers have an office in Belgium, in order to be closer to the Dutch language market. Glénat and Dargaud are the largest French

publishers who have such an affiliate. Before they initiated that, they licensed their albums to Dutch and Belgian publishers.

Apart from France, only Sweden played an important role as a foreign publisher in the Dutch language area: since the end of the 1960s the magazine publisher Semic International, a multinational firm owned by the Swedish Bonnier family, produced hundreds of albums and magazines in The Netherlands under the imprint Semic Press, including American and French licensed titles, but also comics by Dutch artists. After mergers and acquisitions Semic became Sweden's biggest publisher of comics.

In 1985 Semic also became the owner of Junior Press- the Dutch publisher of American superhero comics like *Spiderman* and *The X-men*. In 1997 Semic Press was sold by Bonnier to the Danish multinational magazines publisher Egmont (Bonnier and Egmont can be considered as the Scandinavian counterparts of the Dutch VNU). Junior Press was sold to Dutch entrepreneurs and became a small, independent superhero publisher.

The second Swedish publisher active in The Netherlands was Williams. Williams was active here from 1972 until 1975, the year in which it was acquired by Bonnier and their comics became part of the publishing list of Semic Press. Williams especially published many (more than 700) magazine-issues in the mini-comics format and the American comic book format.

The proportion of Dutch publishers was especially high in the first decades after 1945. Later the Dutch share became smaller, although it always remained the largest group within the population. As we can see in Figure 4.11 the share of Flemish publishers has increased since the middle of the 1980s, and the share of Wallonian publishers has remained quite stable over the whole period. French publishers became structurally active on the Dutch language market since the 1970s.

Our views on these data changes if we take a closer look at the numbers of albums produced by the publishers, and relate this to their country of origin (Figure 4.12). It appears that Wallonian, Flemish and French publishers have been relatively more active than Dutch publishers, which explains why the proportions of these publishers are higher here than in the graph with the numbers of publishers.

Figure 4.11 Album publishers by country of origin

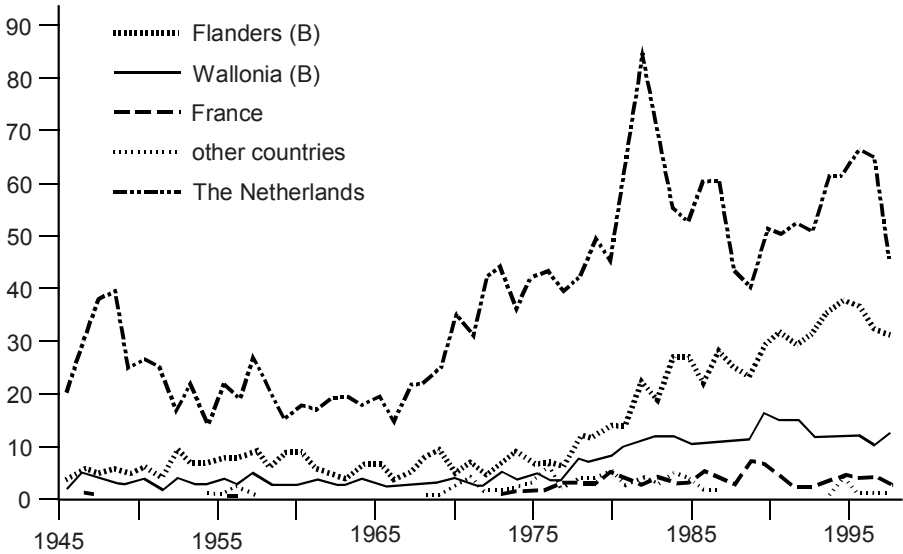
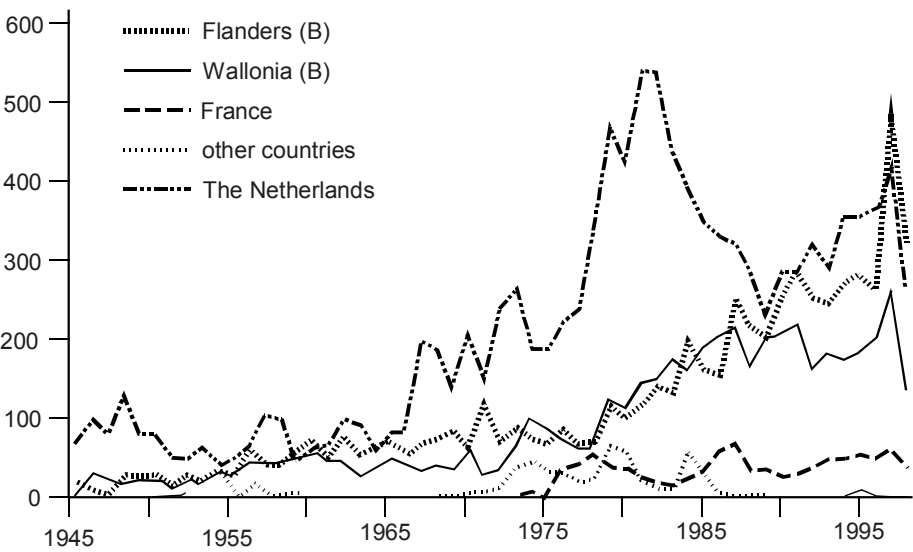
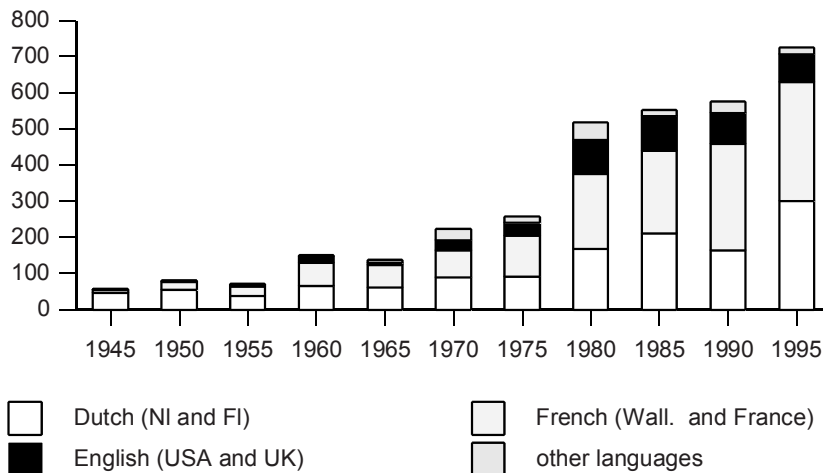


Figure 4.12 Album production of publisher by country of origin



It is interesting to find out what the dynamics are of the proportions of originally Dutch language comics versus translated comic albums. This time the additional information was not collected for all albums (that would take too much time), but for a sample. Every fifth year was selected in the period 1945-1995. For the albums that were produced in these eleven years (1945, 1950, 1955, 1960, 1965, 1970, 1975, 1980, 1985, 1990 and 1995) we traced the original language. Again the sources mentioned in Chapter 3 were used.

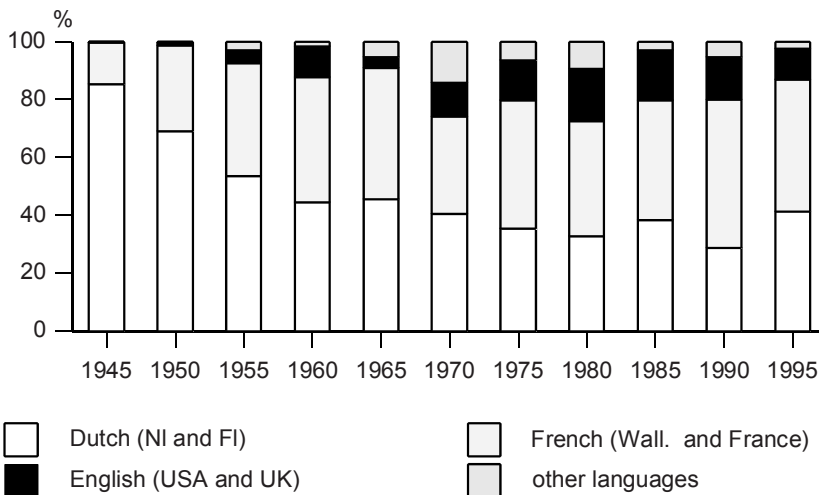
**Figure 4.13 Album production by original language**



Figures 4.13 and 4.14 show the main findings. Dutch and Flemish albums are brought together in one Dutch language group, just as Wallonian and French comics got the denominator 'French language albums'. Apart from these languages only the number of translations from English (mainly from the United States and the United Kingdom) is large enough to show separately in the diagram. There are also translations from Spanish, Italian and other languages, but these form even smaller groups in the whole sample. In Figure 4.13 we see that Dutch language albums and translations from French are the two largest categories. Albums in both categories have increased since 1980. Figure 4.14 shows the proportions between the language groups. Albums originally in Dutch only had a share of more than 50% in the total album production in the years before 1960. After that, the album market was dominated by translations and the proportion of originally French language al-

bums becomes larger than that of Dutch language albums. The proportion of Dutch language albums hovers around 40% since 1960. An average 20% of these albums are produced by Dutch publishers, and the other 20% by Flemish publishers. The proportion of originally French language albums is even higher: these percentages vary between 40% and 50% since 1960.

**Figure 4.14 Proportions of album production by original language**



In comparison with other books the Dutch share of 20% in the production of all comic albums is very low: according to Heilbron (1995) the Dutch share in the total number of books produced in The Netherlands is 75%. If the production of fiction books in The Netherlands is taken separately (most comics are fiction, not non-fiction) translations from English appear to have the largest share in books that are not originally Dutch, and the share of translations from French varies between 7 and 15% (Van Voorst, 1997, p. 26). In the world of comics the role of English translations is small, whereas the position of originally French language albums is remarkably strong.

Figure 4.13 also shows that although French language comics are an important part of the album supply in The Netherlands and Flanders, this has certainly not lead to a complete disappearance of original Dutch-language albums. Some publishers

have specialized in originally Dutch language comics, others specialize in translations. Others produce a mixture of translations and originally Dutch comic albums. In combination with a specialization in one or several genres of comics, this has led to a large variety of albums, and to a diverse population of publishers.

#### 4.4 CONCLUSIONS

In this chapter a concise history of comics and their publishers in Belgium and The Netherlands was followed by a description of the comics niche based on quantitative data. The *SDCN-database* was used to present the developments of the complete population of Dutch language comics publishers, and of their products, in the 140 years that the database covers: 1858-1998.

The number of comics publishers has been growing since the end of the 1960s. Gradually the album replaces the magazine, as appears from the numbers of albums and numbers of issues of magazines produced, and from the specializations of the publishers.

Among the whole population of 1,301 publishers there is only a very small group that is productive. Only 40 publishers produced more than 100 comic albums. These organizations belong to the core of the comics industry in The Netherlands and Belgium. In The Netherlands VNU is the most productive comics publisher, in Flanders Standaard, and in Wallonia the publishers that belong to the Média Participations group (Lombard and Dargaud).

Specialized album publishers outnumber publishers that produce albums and magazines only since the 1990s. Before that organizations that had their origin in the production of magazines dominated the album market, which may have had an impact of the status of the album as an independent medium.

The majority in the population of comics publishers has a Dutch origin (64%), however their share in the total album production is comparable to that of Belgian publishers (46% respectively 47%), who form only 28% of the population. The only productive publishers from other countries than The Netherlands and Belgium are from France and from Sweden.

Already since 1960 the share of translated comic albums in the total supply is bigger than that of originally Dutch albums. Especially translations from French are responsible for the large amount of translated comics (between 50% and 60% of the annual comic album supply). Originally Dutch and Flemish comics each take a share of approximately 20% in the album supply. The share of these comics has not diminished further since the 1960s; it is relatively small but stable. In comparison with other books on the Dutch market there are far less originally Dutch titles, and far more translations from French.

In this chapter descriptive statistics were used. If we want to explain the demographic evolutions in the population of comics publishers, we will need to perform more advanced analyses. This is the subject of the next chapter.

# CHAPTER 5

## THE ECOLOGY OF COMICS PUBLISHERS

### 5.1 INTRODUCTION

After the description of historical developments of comics and their creators in the previous chapter, this chapter continues with the dynamics of the publishers involved in the production of comics in The Netherlands and Belgium. Concepts that will be used are derived from organizational ecology and related theoretical streams; these were introduced in Chapter 2. The database that provided the empirical input was already introduced in Chapter 3. The analyses especially focus on publishers of comic albums. Section 5.2 describes the consequences of the *de alio* / *de novo*-organizations ratio for the album niche, using descriptive statistics. In Sections 5.3 and 5.4 two ecological analytical models are tested on the population of comic album publishers. The first one concerns the entry of new organizations in this niche, and the second one the hazard of exit. Together with the qualitative data from the Chapters 4 and 6, this chapter will provide the data for the co-evolutionary Chapter 7.

### 5.2 NICHE IDENTITY: DE ALIO AND DE NOVO

#### 5.2.1 Introduction

As was already introduced in Chapter 2, the dynamics in the proportions of ‘de alio’ and ‘de novo’ organizations in a population express the development of the legitimacy of a new product, and they influence the identity for the organizational niche around that product.

The activities of large, well-known de alio companies in a niche can be a condition for the legitimacy of a new product (McKendrick and Carroll, 2001). The presence of large de alios in a new niche suggests to other actors that the product is viable



and that specialization into the product can offer market opportunities. Newcomers, who from their foundation have specialized in the product, will then enter the niche.

According to Hsu and Hannan (2005) the *sharpness* of the niche's identity depends on the share of de novo and de alio organizations in the niche.

De novo organizations will only enter the niche if it contains enough resources for specialization. If on the longer term this appears not to be the case, the de alio organizations will continue to dominate the niche. It will remain associated with de alios and with the niches that they originated from. The new niche will not develop as a field with an identity of its own, and this can lead to a short life cycle of that niche.

The theoretical assumptions underlying the de alio and de novo concepts have thus far been tested empirically on the early American automobile industry (Carroll *et al.*, 1996), and on producers of data storage hardware (McKendrick and Carroll 2001, McKendrick *et al.*, 2003, Khessina and Carroll, 2008). Findings from another industry would be useful, if only for the reason that more variety in the industries for the tests could improve the theory.

As we saw in the last chapter the comics niche is narrowly related to other niches: magazines, newspapers and books. When comics got their own media (instead of being a part of another medium: a newspaper or a magazine), specialized comic magazines were the first popular format. Comic albums have been published in The Netherlands already since 1858, long before the first comic magazines appeared on the market, but during a century only on an incidental basis. In the 1970s and 1980s, the supply of comic albums increased, so that comic albums gradually took over the magazines' position as the main medium for comics. We did not pay attention yet to the origins of the publishers: how many of them were they de alios and how many were de novos? This is what we will do in this section. The results of our findings can help us understand the role the publishers played in the identity of the comics niche and in the late recognition of comics as an independent cultural medium.

### 5.2.2 Methodology

In order to find out which dynamics have taken place in the comics niche, each publisher has to be classified as *de alio* (a publisher with a different background than comics), or a *de novo* (a publisher that had specialized into comics from its start). The *SDCN-database* did not include variables related to the origin of the comics publishers, which meant that these data still had to be collected. An attempt to do this for all 1,301 album publishers resulted in the conclusion that this was a ‘mission impossible’, because of the lack of reliable sources for this kind of information, especially if it concerned the (many) very small, sometimes obscure organizations in the database, that were only active in the comics niche for a short while.

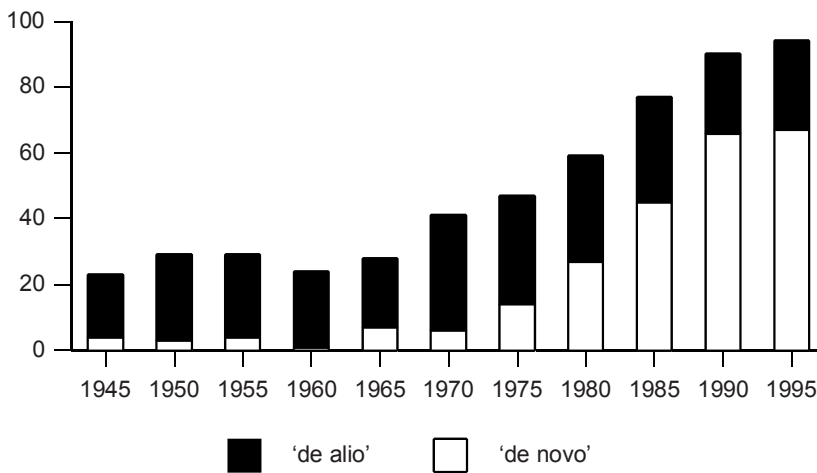
Therefore the idea to collect information about the ‘*de alio* / *de novo*’ status for all publishers was replaced by a somewhat less ambitious, but more realistic project. We limited the number of publishers and then used a sample from the original database.

First we filtered all records without a year of publishing from the database. These could not be used anyhow, because we want to analyze the developments over the years. The next step concerned the hit & run (h&r) publishers, who only produced comics for promotional purposes (see Chapter 3). These were omitted, because they were not a part of the regular market. Most of their albums were gifts. Nevertheless we have to keep in mind that the use of comics (including albums) for promotional purposes has been a property of comics since its early days. As we saw in Chapter 3 there were 374 h&r publishers among a population of 1,301: almost one third of the entire population. Although they only produced 4% of all albums the h&r publishers contributed to the identity of the comics niche. Their activities partly explain why comics have so long been associated with commercial values, and have been considered as a derived product instead of as an independent medium. If the h&r organizations had been included in the sample, *almost* all of them would have been given the status of a *de alio* organization. Not all, because a very small number of h&r’s specialized in comic albums (for promotional purposes) since their foundation.

After these steps we took a sample from the data, by selecting every fifth year in the period 1945-1995, hoping that it would be possible to collect information about all publishers that produced albums in one or more of these eleven years (1945,

1950, 1955, 1960, 1965, 1970, 1975, 1980, 1985, 1990 and 1995). This resulted in a sample of 339 publishers. Together they have produced 92% of all albums in the database (23,200 out of 25,168). For these 339 publishers it proved to be possible to find reliable information about their origin, again by using the sources mentioned in Chapter 3. Each of the publishers could be categorized as either ‘de alio’ or ‘de novo’.

**Figure 5.1 ‘De alio’ and ‘de novo’ publishers of albums**



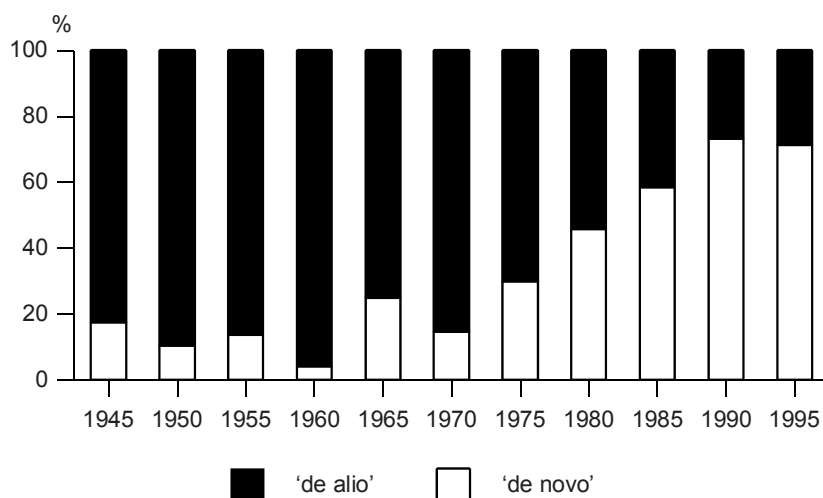
A painful disadvantage of this sample is that it is not possible to use it for the same kind of statistical analyses that have been done in earlier research based on ‘de alio/de novo’ proportions in organizational populations. For that purpose, the remaining number of observations in the sample is too small. Nevertheless, descriptive statistics are possible. The most important findings are shown in Figure 5.1 and Figure 5.2 and described in the next section.

### 5.2.3 Findings

Already in 1945 there were four de novo comic album publishers, which is remarkable for a relatively new product. One of these publishers is the Dutch com-

pany *Fokkie Flink*, which only published the comics series of the same name, and just in one year: 1945. These stories were pre-published in the newspaper *Trouw*. Joop Geesink, who also cooperated with Marten Toonder and later became well known in The Netherlands because of his animation movies (a.o. *Loekie de Leeuw*), was one of the artists behind *Fokkie Flink*.

**Figure 5.2** Proportions of 'de alio' and 'de novo' publishers of albums



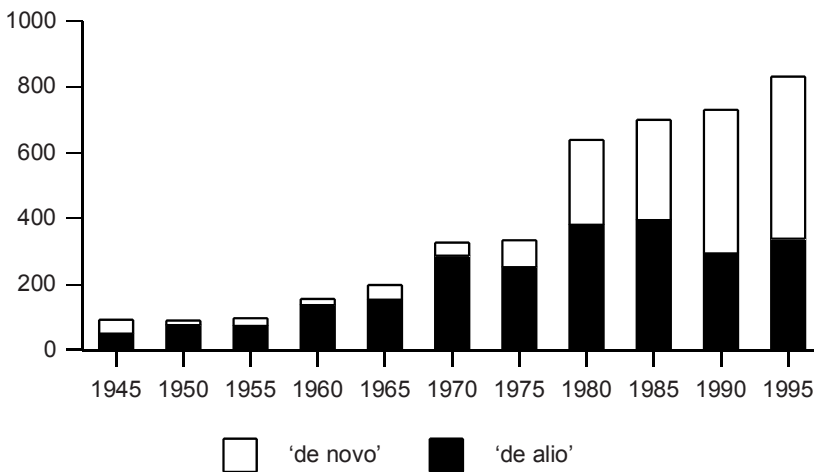
In 1950 Lombard entered the Dutch language album market. This is the first 'de novo' comics publisher that still exists these days. Lombard, now part of Média Participations, is in fact one of the largest European comics publishers. The Walloonian publisher Raymond Leblanc started Lombard in Brussels in 1946 with *Tintin* magazine and its Dutch language version *Kuifje*. Since 1950 Lombard became active on the album market, using the same formula that Dupuis had introduced earlier: publishing the most successful comics in album format, that had been pre-published in their magazine (in the case of Dupuis this was the magazine *Spirou*, and its Dutch language version *Robbedoes*).

But Lombard would remain one of the few enduring de novo publishers for a long time: the alio publishers outnumber the de novo publishers in the period 1945-1975 by far, as can be seen in Figure 5.1. Only since 1980 this begins to change; there is a growth of the de novo publishers (see Figure 5.2). In that year both categories are

almost in equilibrium, and in 1985, 1990 and 1995 de novo publishers are in the majority. The proportions continue to shift in the advantage of de novo album publishers, until in 1995 seventy per cent of the population exists of specialized de novo album publishers.

If we take a look at the numbers of albums produced by the publishers in the sample (see Figure 5.3), we see that it takes longer for the production of the de novos to outnumber that of the de alios. The accumulated album production of the de novo publishers is higher than that of the de alio publishers since 1990.

**Figure 5.3** Albums produced by 'de alio' and 'de novo' publishers



#### 5.2.4 Discussion and conclusions

According to the theory as described by McKendrick *et al.*, (2003), the comic album niche has only since a relatively short time developed the sharpness necessary for the organizations in that niche to 'emerge as legitimate, established types' (Hsu and Hannan, 2005, p. 481).

Since 1980 the numbers of de novo publishers were big enough to contribute to an identity of the comic album niche, but their production was still smaller than that of

the *de alios*, so the identity could not be very sharp. This changed in the favor of the *de novos* very recently: since 1990. Before that year the niche was dominated by organizations that had their origin in other niches: mostly general magazines, books and newspapers.

It is not certain whether these findings would hold if the total population in the whole period would be taken into account. But the fact that the sample represents publishers that together are responsible for 92% of all comics in the database makes this plausible.

The findings imply that during the largest part of the previous century the identity of the comic album niche is based on the *de alios*' niches. For these organizations general magazines, newspapers and books are more important products than comic albums. Comic albums were a secondary order, derived product. Although comic albums are a medium of its own, it is no more than logical that they have been perceived as derived products by the general audience, because this was the image spread by the majority of its producers.

*De novo* album producers will spread a different vision on comic albums: they market them as an independent, cultural medium with its own properties. However, the period during which *de novos* dominate the supply side of the niche is very short in comparison with the '*de alio era*', and will have had less impact on the perception of comics among a general audience.

A general conclusion is that the long-during lack of legitimacy of comics as an independent cultural medium is not only caused by properties of the medium itself, but also by the identity of the organizations involved in their production.

Samples as used here are not in line with the ecological principle of collecting and using information about a whole population. Nevertheless we think that descriptive information derived from a sample was useful in this case. In the next sections we shall use 'pure' organizational ecological methodology, and analyze entries and exits of the entire population of comic album publishers.

### 5.3 ENTRY ANALYSIS

#### 5.3.1 Introduction

As became clear in the previous chapter, in the second half of the 1960s there was an increase of the number of publishers that were involved in the comic albums production, a rise that became even steeper in the late 1970s and early 1980s. This development was accompanied by an increase of the number of albums produced annually, and a gradual decrease of the magazine production. It appears that one comics-format (the magazine) was replaced by another (the album).

In general the dynamics of organizational populations in differing niches show comparable patterns, that can be discerned after analysis of data concerning the whole population, that cover a longer period (Hannan, 2005). Our database, introduced in Chapter 3, meets those conditions. In the case of comics, an analytical model that has been tested sufficiently in earlier research could provide information about the presence of a new niche: that of the album publishers.

Organizational populations behave according to ecological principles if they are formed around a niche. Only if there is a niche can organizations in that niche develop their own identity (as a collective, as subgroups, or as individuals within the niche). Producers of comics in general can be seen as a niche, but is not clear yet whether or since when comic albums are a niche of their own. In this section entry analysis shall be applied to the data of album publishers, to get an answer to these questions.

Subsection 5.3.2 continues with entry analysis models, summarizes findings from earlier research, and ends with hypotheses for an entry analysis of the album publishers' population. Subsequently, in Subsection 5.3.3 the data and the analytical design are described. After that the analysis itself follows with the results (Subsection 5.3.4). Finally, the findings are discussed and conclusions are drawn in Subsection 5.3.5.

### 5.3.2 Entry analysis

Entry analysis focuses on the relationship between numbers of newcomers or entries in an organizational population on a certain moment, and characteristics of incumbents of that same population. Often entries are also referred to as ‘founding rates’. As was shown in the previous chapter, many publishers (the *de alio* organizations) were founded before they entered the comics market. That is the reason why in this text we shall use ‘entry rates’ or entries instead of ‘founding rates’.

Among the characteristics or variables of organizational populations there are two that have proved to be important in explaining the behavior of newcomers in earlier research. The first one is the density of the population on a specific moment, expressed in the absolute numbers of organizations that are active in the niche. The second one is the market share of the four largest organizations in the population (the four-firm concentration ratio), also called ‘C4’, on a specific moment. The market share refers to the sales of the organizations or, as in our case, to their production, and is expressed in percentages. The time-units that have been used most often for entry analyses are years.

By means of regression analysis it can be discovered whether the dependent variable ‘entry’ is related significantly to the independent variables ‘Density’ and ‘C4’. Control variables, depending on the context of the niche, have to be added in order to filter out the effect of other variables that may have an impact on the independent variable.

The most relevant findings of earlier research that applied entry analysis, done in varying populations and niches, showed that there is a positive relationship between density on the one hand, and entries of newcomers on the other hand. The explanation for the relationship is that newcomers are attracted by organizations already active in a niche. This relationship can also exist between C4 and entries, but here there are differences between populations. Especially Type I industries, where scale advantages are important, show this relationship (Boone and Van Witteloostuijn, 1995; see Chapter 2). Large generalists, that often form the C4, fill up the centre of the market, and thereby leave space for smaller specialists. In some industries Type I and Type II-dynamics are intertwined, and in those cases there is also a relationship between density and C4 (Boone and Van Witteloostuijn, 1995, p. 286). Because of this differentiation, it is necessary to include density as well as



C4 in an analysis on the area of population dynamics (Boone and Van Witteloostuijn, 1995, p. 286), like the one done here.

There are two conditions for a relationship between the concentration level of generalists and the entry of specialists. The resources for the generalists should have a high homogeneity, and the resources of the specialists should have a minimum level of heterogeneity in their resources (Boone and Van Witteloostuijn, 1995; Boone *et al.*, 2002).

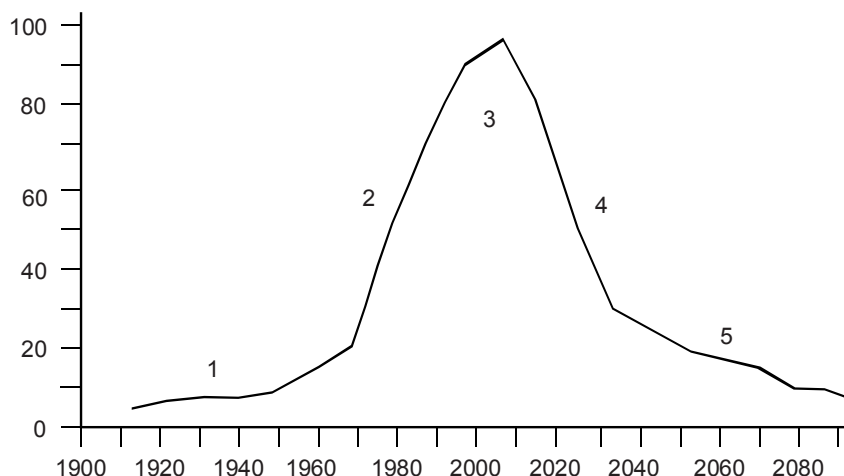
The comics publishers belonging to the C4 are mainly (large, *de alio*) generalists that have a rather uniform audience, existing of (families with) children. They typically belong to that part of the industry that needs scale advantages. The specialists have more diversified audiences: not only children and families, but also adolescents, adults, and buyers of specific genres. In the album market the conditions for an expected relationship between concentration level and the entry of specialists are met.

The incumbents and C4 do not only express the existence of a niche around a product or a service, they also provide legitimacy to others who join that population. In terms of Suchman (1995), this is the pragmatic type of legitimacy. Large *de alio* organizations in a niche can play a comparable role. Because they are or have been active in other, already established niches, they usually have more power than *de novo* incumbents, and function like a magnet for other organizations (McKendrick and Carroll, 2001, p. 676).

There are limits to the density of each niche. This is referred to as a niche's carrying capacity (Boone and Van Witteloostuijn, 1995, pp. 268-269). On a certain moment all niche spaces are filled, and competition overrules the effects of legitimation (Hannan *et al.*, 1995, p. 510). This causes an inverted U-form in Figures that show the nonmonotonic relationship between density and entries in populations that have been followed for a long period (Hannan and Carroll, 1992). This pattern is often referred to as 'density dependence'. Models that analyze the relationship between entries and density often include both density and density<sup>2</sup>-variables. The density<sup>2</sup>-variable incorporates the effect of competition, which causes the curvilinear form of the relation entry-density.

Figure 5.4 shows a 'simple' density curve. In the early years of the niche (phase 1), there are only a few incumbents, and the density increases gradually. In the course

Figure 5.4 'Simple' density curve



of time the niche gains legitimacy, until it reaches a level that is needed to attract larger numbers of newcomers. Then an exponential increase of newcomers takes place, together with a steep rise in density (phase 2). After a period of saturation (phase 3), in which the population has reached its carrying capacity, density decreases again, at first fast (phase 4), as a consequence of intensified competition and density delay, then more slowly (phase 5). Density delay is caused by a scarcity of resources in periods with a high density. In the final phase the niche is populated with the survivors of the competitive battle. In some populations, this cycle can take twenty years, in other niches it can take a hundred and fifty years.

There are more complex models that explain subsequent cycles within the niche. These variants include a resurgence of density after a decline, which can be related to population inertia and 'community ecology': ecological developments that are niche-specific (Ruef, 2004).

In Chapter 4 we saw that although there were album publishers before World War Two, album publishing really became an industry after the war. The first generation of post war comics publishers that often combined the publishing of magazines and albums, appeared to be at the end of their lifecycle in the middle of the 1960s,

but was succeeded by a new generation of publishers, mainly specialists who only produced albums. These caused a steep growth of the population that continued in the 1970s and 1980s. Especially this new generation counted more and more de novo comics publishers. Since 1985 de novo comics publishers outnumbered de alio organizations, and since 1990 their album production outnumbered that of the de alio publishers (see Section 5.2).

On the basis of earlier research on organizational populations we expect that there is no significant relation between entries, C4 and density before the war, whereas this relationship becomes significant after the war.

We also expect that after the strong growth of the population in the 1970s and the 1980s, the niche reaches its carrying capacity in the last decades of the previous century. In these decades competition in a niche would be fiercer than before. The entrance of de novo publishers, who specialize in smaller sub-niches with heterogeneous resources that cannot be reached by generalists, also suggests this development. In our data this should be reflected by a stronger relationship between entries and C4 in the 1980s and 1990s, in comparison with the earlier post-war period 1945-1979.

Summarizing the above, we come to three hypotheses with regard to entries, density and C4 in the niche of album publishers:

HYPOTHESIS 1A     *Entries in the niche of comic album publishers have a non-monotonic relationship with density after 1945, whereas there is no such relationship before 1945.*

HYPOTHESIS 1B     *Entries in the niche of comic album publishers have a non-monotonic relationship with C4 after 1945, whereas there is no such relationship before 1945.*

HYPOTHESIS 2     *The relationship of entries in the niche of comic album publishers with C4 is stronger in the period after 1979 than in the period 1945-1979.*

### 5.3.3 Methodology

#### 5.3.3.1 Data

The database that will be used here has already been introduced in Chapter 3. Only the data about the album publishers are necessary. This concerns 1,301 organizations. Among them are 374 ‘hit & run’-publishers (for the definition of this category, see Chapter 3), and 927 ‘real’ publishers. The organizations that got the label ‘publisher unknown’ (see Chapter 3) will be part of the ‘hit & run’-population. The analyses shall be run twice: once for the ‘real’ publishers only, and once for the complete population, including the ‘hit & run’-publishers. We do not expect that there will be many differences in the outcomes, because of the smaller number of hit & run publishers (29% of the whole population), but we shall try to find out whether the hit & run publishers behave differently than the regular publishers.

Although the first Dutch language comic album was already published in 1858, the album by Alphonse Töpffer (see Chapter 3), this did not mean that albums were published regularly from then onwards. Only six albums were published in the remainder of the 19<sup>th</sup> century, all reprints of the same album by Töpffer, by three publishers, including the publisher of the original edition. There were long periods in which no album was published at all. This only began to change in the beginning of the 20<sup>th</sup> century: after 1905 at least one album was published almost every year, and starting with 1915 there was no year anymore without at least one album published. This is why for the analysis only the data of the period 1905-1998 are included.

A number of publishers in the database were subsidiaries (sometimes after mergers or acquisitions) or imprints (brands) of larger companies that often were also active in the comic album market under their own name. Before the analysis the names of these imprints were changed in the names of the parental organization. Of course the publishers kept their own name in the periods that they were independent.

In other cases the albums were published by combinations of publishers. Mostly two, sometimes three publishers were involved. If these publishers belonged to the same parent organization, the name of the combination was replaced by that of the parent. In all other cases the numbers of co-produced albums were divided through the number of publishers involved. Each publisher got an equal share of the pro-

duction (e.g. one album co-produced by two publishers, meant 0.5 albums added to the production of each individual publisher).

### 5.3.3.2 *Dependent and independent variables: entries (dependent), density and C4 (independent)*

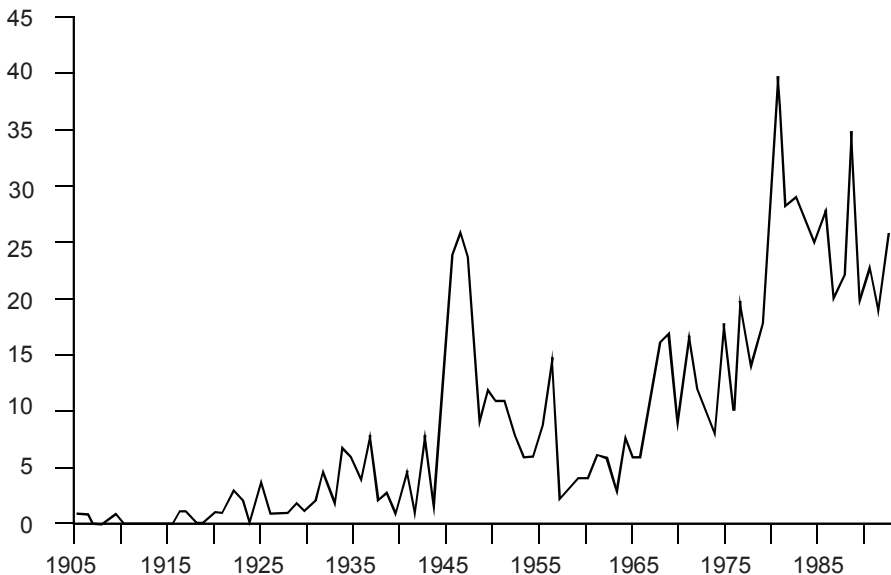
After a first try-out of the analysis, a number of ‘real’ publishers appeared to publish albums only occasionally, and in that respect did not behave very differently from the ‘hit & run’-publishers. For example, a publisher could publish three albums in year  $t$ , no albums at all in year  $t + 1$  and  $t + 2$ , and then again ten albums in year  $t + 3$ . Often these were de alio organizations, whose main activities were in other niches (magazines, newspaper or books), or smaller de novo publishers, especially in the early years of their existence. The problem that arises then, is whether these publishers should be included in the density figures of years in which they did not publish anything, and if the answer to this question would be ‘yes’, the next question is: for how long?

Organizations that do not make the same product for a long, uninterrupted period, lose their knowledge on that area, and have to build up their knowledge about that product from scratch if they reenter the market. It can be expected that most publishers that produce comic albums irregularly are de alio organizations. Most de alios have a background in publishing books, newspapers or magazines. This means that the general knowledge about publishing will not disappear very quickly if there is a period in which no comic albums are made. For this reasons it was decided that the maximum length of non-activity that would still be acceptable for inclusion in the density figures, could be a relatively long period of non-activity: five years.

Some publishers reentered the market with an album after six or seven years. In these cases, they got a new code, in addition to the variable with the name of the publisher, in the year of entry with the new publication. So, publishers who during their existence published albums every year or at least regularly (without leaps of six years or longer) only have one code, whereas publishers who publish irregularly have two or even more codes. In this way the re-entry of a firm can also be seen as an entry of a new firm. By means of these codes attached to publishers it becomes possible to differentiate between publishers and their entries. In total 14% of

the publishers had more than one code, these were the irregular publishers, and 86% had just one code. The highest number of codes for one and the same publisher was five, but only one publisher belonged to that category. Most of the other irregular publishers had two codes. To improve the validity of the analysis, numbers of entries, density and C4 were based upon the codes. For C4 the codes were counted of the four publishers with the highest numbers of albums published in every year. Figure 5.5 shows the entries in the period 1905-1994.

**Figure 5.5 Entries of album publishers 1905-1994**

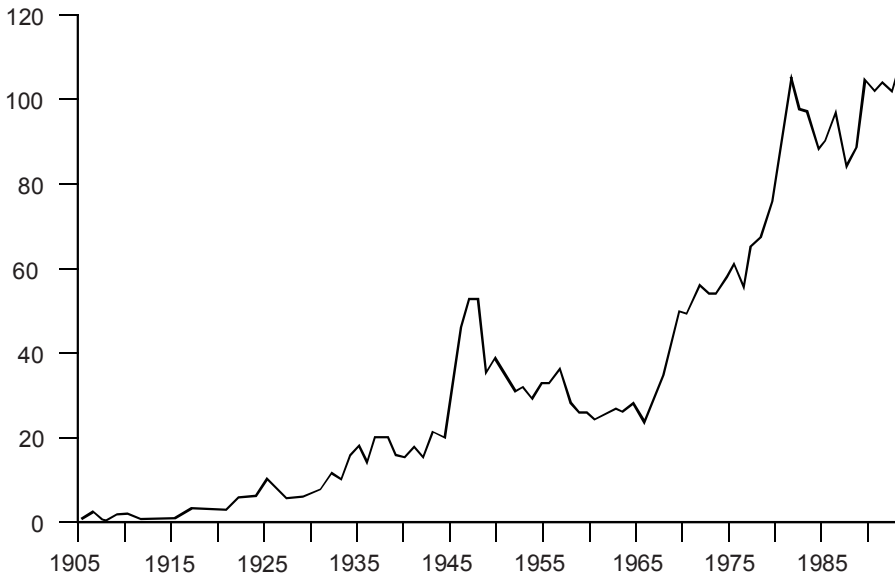


As has been explained above, publishers who do not produce an album during a period longer than five years are considered to have left the comics niche, and are labeled as 'exit' in the year of their last publication. That is: the variable 'exit' in the dataset gets the value '1' for that publisher (otherwise the value is '0'). Density is calculated with the numbers of entries and exits. A number of exits  $n$  in year  $t$ , leads to a density reduced with  $n$  in year  $t+1$ .

In the most recent years that are covered in the database, it becomes more complicated to calculate density, because of right censoring problems. Inactive publishers in this period might have exited the niche, but this cannot be calculated, because our data are only reliable until the year 1998 (see Chapter 3). The 'exit after more than five inactive years'- formula cannot be applied anymore. This leads

to numbers of exits much lower in the years after 1994 than in the period before and as a consequence to a distorted rendering of density in the period 1995-1998. Because of this, the analysis will be limited to the period 1905-1994. In the graph below (Figure 5.6) the density of the comic album publishers in the period 1905-1994 is shown.

**Figure 5.6 Density of comic album publishers 1905-1994**



### 5.3.3.3 Control variables

It is plausible that general societal variables are related to publishers' behavior. Among them are demographic and economic developments. It might also be that the dynamics of the comics publishers' population are related to developments in the publishing industry in general. Therefore, data about the total production of Dutch language books would also make the analysis more valid. For each of these variables, data were collected with regard to the period that the database covers. CBS ('Centraal Bureau voor de Statistiek': the Dutch Office for Statistics) provided the data for these three control variables.

As far as economic developments were concerned, the indicator Net Domestic Income (NDI) was preferred above Gross Domestic Product (GDP) or Gross

Domestic Income (GDI), because NDI was the economic variable with most observations in the period 1905-1994. For GDP and GDI a number of values in the period before 1940 were missing, in addition to six missing observations of the war years 1940-1945, whereas for NDI only the data of the war years were lacking. To fill this gap in the CBS data other available data were used, that were collected by Klemann (2002).<sup>1</sup>

Data about book title production were also not available for the whole period. The data for the missing years in the period 1905-1935 were interpolated.<sup>2</sup> Information about numbers of publishers in general in the 20<sup>th</sup> century would have been useful, but was not complete.<sup>3</sup> For these reasons this variable was not included in the data-set.

Other control variables could be derived from the database itself: industry age (starting with 1858: the year in which the first Dutch language comic album was published), and the total number of albums published every year.

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<sup>1</sup> Klemann's (2002) historical study about the Dutch economy during World War Two addressed the issue of economic growth in the first two war years - something that was not shown in data published earlier by CBS (at this moment CBS leaves the values for NDI in the war period blank in their databases).

<sup>2</sup> The CBS data about book title production are only complete since 1935 (and include the title production in the war years). In the period 1905-1935 data are only available for every fifth year: 1905, 1910, 1915, 1920, 1925, 1930, and 1935. The years in between were interpolated.

<sup>3</sup> The CBS data concerning publishers are not representative for the whole population in the years before 1993, because they only contain information about the largest publishers: those with 10 or more employees in the period 1946-1986, and those with 20 or more employees in the period 1987-1992. Only since 1993 all publishers are counted. To give an indication of the number of publishers that is missing in the earlier CBS data: in 1993 there were 2,200 publishers in total, but only 290 of them had 10 or more employees. 180 Publishers within this group had 20 or more employees. Only these categories would be in the earlier CBS-data. Many publishers are very small: e.g. in 1993 1,120 out of 2,200 publishers were 'one-man'-companies. According to the CBS data in the period 1993-2006 51% of all publishers belonged to this group.



**Table 5.1 Descriptive statistics entry analysis 1905-1994**

variable	observations	mean	SD	min	max
entries	90	9.466667	9.748754	0	40
density	90	34.9	32.56663	1	110
density <sup>2</sup>	90	2,266.811	3,378.426	1	12,100
C4	90	0.5331283	0.2667533	0	1
population (x 1000)	90	10,244.13	3,089.965	5,460	15,342
NDI (x € 1.000.000)	90	47,205.62	70,767.35	934	248,372
industry tenure	90	91.5	26,1247	47	136
total album production	90	209.3	260.4051	0	807
total production of book titles	90	7,947.922	4,138.081	1,847	18,001

Table 5.2 Correlations between variables

	entries	density	density <sup>2</sup>	C4	popula- tion	NDI	industry tenure	TAP*	TPBT**
entries	1.000								
density	0.9254	1.000							
density <sup>2</sup>	0.88	0.9587	1.000						
C4	-0.4285	-0.4691	-0.3935	1.000					
population	0.7805	0.9078	0.7902	-0.4711	1.000				
NDI	0.7912	0.9337	0.963	-0.3847	0.8285	1.000			
industry tenure	0.7865	0.9096	0.7888	-0.4652	0.997	0.818	1.000		
TAP	0.8584	0.9632	0.9585	-0.4259	0.8852	0.971	0.8747	1.000	
TPBT	0.7672	0.9063	0.8349	-0.4541	0.9534	0.8891	0.9408	0.9172	1.000

\* TAP = total album production

\*\* TPBT = total production of book titles

#### 5.3.3.4 Method and models

Descriptive statistics of the entire period 1905-1994 are shown in Table 5.1. The numbers mentioned under ‘Observations’ refer to the numbers of years that are measured for a variable, within the period 1905-1994: every year is one observation.

In the first models for the analysis, all control variables mentioned above (GDI, population, total production of book titles, total album production) were included. These showed strong correlations with each other (see Table 5.2). Due to this multicollinearity, it was decided that they should be replaced by just one control variable, of which the data for every year were available: total album production.

Datasets that use counts of events (like entries in a given year) are commonly analyzed with Poisson regression models or with negative binomial regression models if the data show overdispersion in Poisson distribution (Carroll and Swaminathan, 2000, p. 738). This means that the conditional variance of entries in the measured periods exceeds the conditional mean. The data used here showed overdispersion: the dispersion (quotient variance/mean) in both relevant periods is larger than 1 (see Table 5.3), and therefore Poisson regression was replaced by negative binomial regression.

**Table 5.3 Descriptive statistics of entries by period**

entries	1905-1944	1945-1994
observations	40	50
min	0	2
max	8	40
mean	1.95	15.48
SD	2.25	9.25
variance	5.07	85.56
dispersion	2.60	5.53

According to our hypotheses new entrants in a niche are influenced by density and/or C4, and in the case of actual influence the volume of density and C4 would

precede the entry. There is always a delay in this supposed influence, because of decisions that have to be taken by the newcomer, and resources that have to be collected before entry (that is: the publication of an album) is possible. Our data just give information about density, C4 and entries in a whole year, and not about their values in periods within that year (e.g. months). The model cannot test influence within a year, but it can be adapted to test influences from the year previous to entry. For this purpose the independent variables and the control variables are ‘lagged’ with a year, which means that the values of these variables in year  $t-1$  are related to the value of the dependent variable ‘entry’ in year  $t$ .

The entry analysis was done for both periods 1905-1944 and 1945-1994 to test hypothesis 1A and 1B. The analysis for the period 1945-1994 was also used to test hypothesis 2. The variable C4 was split up into two variables C4p1 and C4p2, in order to analyze differences within 1945-1994, and still keep the same number of observations.<sup>1</sup> C4p1 kept the original values of C4 in the period 1945-1979, and got the value ‘0’ in the period 1980-1994. C4p2 kept the original values of C4 in the period 1980-1994, and got the value ‘0’ in the period 1945-1979. In order to control whether C4 could be replaced by the two new variables, the Stata command ‘test’ (Stata version 11.0) was executed after the analysis with both variables. This lead to a  $\chi^2$  of 2.75 with  $p > \chi^2 = 0.0974$ . In other words: the probability that C4p1 and C4p2 are not different from each other is (100 % - 9.74 % =) 90.26 %. Therefore we decided we could maintain the replacement of C4 by C4p1 and C4p2 in the analysis for hypothesis 2.

### 5.3.4 Findings

Table 5.4 gives an overview of the models used and of the results of the analyses for the population of ‘real’ publishers. In the second part of this section we shall

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<sup>1</sup> A condition for the negative binomial regression is that the number of observations (in this case the number of years within a period) should be in balance with the number of variables included in the analytical model. As a rule of thumb for each five observations one variable can be included. For the periods 1945-1994 and 1905-1944 all the variables described here could be included, but if we had chosen to analyze the shorter periods 1945-1979 and 1980-1994 some of the variables would otherwise have to be removed from the model.

**Table 5.4**    Negative binomial regression estimates of density-, density<sup>2</sup>-, and C4-lagged on entry rates (between 1905 and 1994); only ‘real’ publishers

period	model 1 1945-1994		model 2 1905-1944		model 3 1945-1994 with two C4s	
	coef	SE	coef	SE	coef	SE
density lagged	0.0847 ***	0.01212	0.1135	0.1749	0.83613 ***	0.01139
density <sup>2</sup> lagged	-0.0004 ***	0	-0.0094 *	0.0055	-0.00044 ***	0
C4 lagged	4.6556 ***	0.08239	0.2758	0.7765		
total album production lagged	0.000164	0.0007	0.0231 **	0.01141	-0.00025	0.0007
industry tenure	-0.01437 *	0.0077	0.0917 **	0.04158	-0.01234 *	0.0074
C4p1 (1945-1979)					4.2791 ***	0.8208
C4p2 (1980-1994)					5.1399 ***	0.8297
constant	-0.8688	1.0852	-6.423 ***	2.2278	-0.7644	1.03
observations	50		40		50	
log likelihood	-140.9464		-55.2625		-139.6486	

\*    p ≤ 0.1

\*\*    p ≤ 0.05

\*\*\*    p ≤ 0.01

SE = Standard Errors

compare the results for the real publishers with those for the entire population, including the hit & run publishers. The complete Stata-output of the command 'nbreg' (negative binomial regression) can be found in Appendix II.

#### ***5.3.4.1 Hypothesis 1A and 1B: 1945-1994 and 1905-1944 compared (models 1 and 2 in Table 5.4)***

If we separate the post-war period (model 1) from the pre-war period (model 2), it appears that the independent variables density and C4 show no significant relationship with entries in the years 1905-1944. Density<sup>2</sup> shows a significant ( $p \leq 0.1$ ) relationship with entry rates in the first half of the last century, but the significance of the coefficients for the control variables total album production and industry tenure (each  $p \leq 0.05$ ), and of the constant ( $p \leq 0.01$ ) are higher. Although there is a significant relationship between density<sup>2</sup> and entries before the war, the significance of this relationship increases strongly after the war (from  $\leq 0.1$  to  $\leq 0.01$ ). Significant relations with all three independent variables are found in the post-war period 1945-1994 with  $p \leq 0.01$  for each of the coefficients (model 1).

The coefficients in Table 5.4 have to be exponentiated before interpretation. In this way one gets an insight into the multiplier effects of density and C4 on entry rates. We find effects of legitimation for the coefficients in model 1 (1945-1994). This is represented by the relation of density with entry rates. The increase of density from mean minus a standard deviation to mean leads to a growth of 321% of the entry rates, whereas adding a standard deviation to the mean increases the entry rates with 127%.

We also find effects of competition, because there is a significant relation between density<sup>2</sup> and entries. However, if we take a look at Figure 5.6, we see that the density curve is not going down yet at the end of the period 1945-1994. So, although competition becomes more important in this period, it has not overruled legitimation completely.

With regard to C4, bridging the distance of one standard deviation from the mean to the mean, leads to a percentual change of 39% in entry rates.

Summarizing, hypothesis 1A (*Entries in the niche of comic album publishers have a nonmonotonic relationship with density after 1945, whereas there is no such relationship before 1945*) is largely confirmed: there is a relationship between density and density<sup>2</sup> with entries after the war, whereas before the war only density<sup>2</sup> and entries showed a significant relationship. But in this pre-war period the relationship between entries and the control variables was even more significant, and in the post-war period the relationship between density<sup>2</sup> and entries was more significant than before the war.

Hypothesis 1B (*Entries in the niche of comic album publishers have a nonmonotonic relationship with C4 after 1945, whereas there is no such relationship before 1945*) is also confirmed. Only since 1945 can the existence of a comic album-niche be legitimized ecologically.

#### **5.3.4.2 Hypothesis 2: differences within post-war periods with regard to relation entries-C4 (model 3 in Table 5.4)**

Our second hypothesis (*the relation of entries in the niche of comic album publishers with C4 is stronger in the period after 1979 than in the period 1945-1979*) is also confirmed: both C4 variables are significant with  $p \leq 0.01$ , but the coefficient of C4p2 (1980-1994) is higher than the coefficient of C4p1 (1945-1979).

Until now we only described the findings for the real publishers. We ran the same analysis for the whole population: real publishers and hit & run publishers together. Table 5.5 presents the models with the results, for the sake of comparison in the same way as in Table 5.4.

In comparison with the findings for the real publishers there are some small differences, but the conclusions with regard to the hypotheses remain the same. In the models 1 and 3 the coefficients of density, density<sup>2</sup>, C4, C4p1 and C4p2 are lower for the whole population than for just the real publishers, but the significance is just as strong. In model 2, the pre-war period, the coefficient for density<sup>2</sup> is not significant, whereas it was for the real publishers only.

**Table 5.5**    Negative binomial regression estimates of density-, density<sup>2</sup>-, and C4-lagged on entry rates (between 1905 and 1994); whole population ('hit & run' and 'real' publishers)

period	model 1 1945-1994		model 2 1905-1944		model 3 1945-1994 with two C4s	
	coef	SE	coef	SE	coef	SE
density lagged	0.05381 ***	0.0095	0.001	0.1461	0.0526 ***	0.0093
density <sup>2</sup> lagged	-0.0002 ***	0	-0.005	0.004	-0.0002 ***	0
C4 lagged	3.4630 ***	0.7916	-0.1391	0.6427		
total album production lagged	0.0006	0.0007	0.0238 **	0.0105	0.0004	0.0007
industry tenure	-0.01404 *	0.0073	0.1297 ***	0.0495	-0.0125 *	0.0071
C4p1 (1945-1979)					3.1191 ***	0.8025
C4p2 (1980-1994)					3.8640 ***	0.8076
constant	0.5681	1.0042	-7.8597 ***	2.6453	0.6861	0.9721
observations	50		40		50	
log likelihood	-154.1456		-57.4817		-153.0372	

\*    p ≤ 0.1

\*\*    p ≤ 0.05

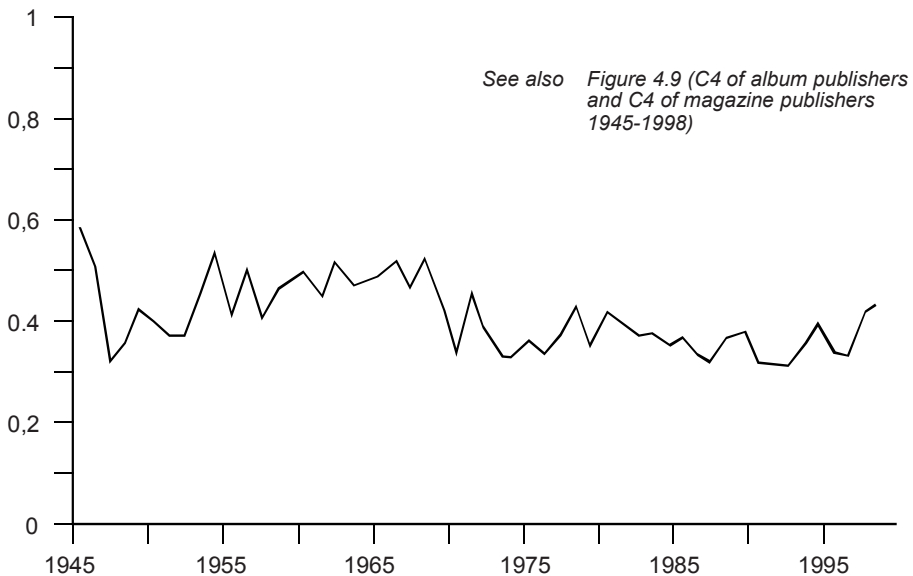
\*\*\*    p ≤ 0.01

SE = Standard Errors



These findings suggest that the entries of hit & run publishers are less influenced by legitimation (density) and competition (density<sup>2</sup>, C4's) processes than the regular publishers. If we look at the criteria used to form the 'hit & run' group, this is not so strange: these are organizations that do not have publishing as their main activity, but who publish comics incidentally, and mainly for promotional purposes. As was expected, the number of hit & run publishers is too small in comparison with the regular publishers to have a substantial impact on the behavior of the whole population.

**Figure 5.7 Share of C4 publishers in album production 1945-1994**



### 5.3.5 Discussion and conclusions

We saw that from an ecological point of view, the niche of comic album publishers has existed since 1945. Density played a role in attracting new entrants in the niche in this period, by providing the niche with legitimation, but competition was also a significant force. Competition gradually became more important, as is shown by another finding: although industry concentration (C4) had a relation with entry rates throughout the second half of the last century, this became stronger after 1979.

Figure 5.7 shows the changes in C4 of album publishers during the period 1945-1994. If we compare this figure with Figure 5.6 (density of album publishers in the period 1905-1994), we see that C4 in the album niche decreases between 1965 and 1970, whereas density starts to rise in the same period. Magazine publishers typically belong to Type I industries, in which scale economies are essential.

In this period publishers of albums, who do not have to invest as much as magazine publishers before production, can be positioned somewhere in between Type I and II: we can expect that they belong to a dual market structure 'with a small number of large market leaders and a large number of small fringe firms' (Boone and Van Witteloostuijn, 1995, p. 281). This fits with the relationship between C4 and density: a relatively small number of generalists produces albums on a large scale, but because they focus on a general audience, they leave enough 'niche width' for smaller, specialized publishers. These specialists have caused an increase in the density of the whole population. The significant relation between entries and C4 confirms that the album niche has a dual market structure.

In addition, the fact that the coefficient entry-C4 has *increased* in 1980-1994 (in comparison with the period 1945-1979), whereas at the same time C4 *decreased* even further, indicates that the market structure of the album niche moves very gradually away from a dual market structure, with a tailed resource space, into the direction of a fragmented market structure, with a rectangular resource space (Van Witteloostuijn and Boone, 2006, pp. 412-414). Nevertheless, in this period the overall image is still that of a dual market structure.

A limitation of our analysis is that there might be other variables that have influenced entry rates. Data were included in our models from control variables that we expect to be relevant. We did not find complete data about the density of all (Dutch language) publishers in Belgium and The Netherlands; otherwise we would have included these also. Although we expect that the included control variables function as an alternative for the missing publishers' data, we cannot be completely sure about that.

In this section, we have discussed the entry rates of publishers and their relationship with density and with the concentration level of the industry, and drew conclusions about the impact of dynamics in density and C4 on newcomers. We do not know yet how these or other variables are related to the exits of publishers from the population. In Section 5.4 a second ecological model will be used, that tests the

survival chances for publishers, and provides us with information about the factors that determine the age of comic album publishers, that is: their tenure within the niche of album publishers.

## **5.4 EXIT-ANALYSIS**

### **5.4.1 Introduction**

A large number of publishers are only active in the niche of the comic album for a short while. Many publishers even disappear from the field after having published just one album (see Chapter 4). In ecological terms such a disappearance is labeled as ‘exit’ and the chances for an exit are referred to as the ‘hazard of mortality’. In the context of our study ‘mortality’ does not necessarily mean that the organization stops to function. Here it simply means that a publisher stops producing comic albums. This is why in this section the terms ‘exit’ and ‘hazard of exit’ are preferred to ‘mortality’ and ‘hazard of mortality’. In this section we shall search for factors that influence the exit-behavior of album publishers. We start Subsection 5.4.2 with a concise overview of earlier research, by paying attention to themes and variables that have been used in earlier studies, and end with hypotheses. Subsection 5.4.3 describes the methodology of our analysis, and includes an overview of the tenures of comics publishers. Subsequently Subsection 5.4.4 renders the results of the analysis. In Subsection 5.4.5 the findings are discussed and general conclusions are given.

### **5.4.2 Hazard of exit-analysis**

#### **5.4.2.1 Introduction**

People tend to think that many organizations reach high ages, but this idea is based on only a very limited number of well-known organizations. In fact these organizations are atypical, because organizations in general have much shorter life expectancies (Hannan, 2005, p. 55). This can be expressed by the ‘half life’ indicator: the age at which half of the population has failed. In our case this would be the tenure at which half of the publishers have left the comic album niche.

Early ecological research showed that the hazard of exit declines with age, which results in the dominance of early movers in a niche (Hannan 2005). This is caused by the fact that capabilities and position improve with age (2005, p. 62). However, later research has led to a refinement of this finding, called the ‘liability of adolescence’. According to this, the ‘hazard of mortality rises during the early lifespan before eventually declining with age’ (2005, p. 62). In some industries there are factors that lead to a U-shaped age dependence: at a young age the hazard of exit is high, then it decreases until at a certain age a turning point is reached, and chances of exit increase again (see a.o. Wezel and Van Witteloostuijn, 2006).

In addition to the relation between age and exit, a number of explanatory variables have been found to play a role (positive or negative) in the exits of organizations. Among them are the niche width that organizations cover (which leads to differing exit rates for specialists and generalists), product portfolio width and expansion (Wezel and Van Witteloostuijn, 2006), density in general (density dependence), density at the time of entry (density delay), and human capital (Bröcheler, Maijoor and Van Witteloostuijn, 2004).

We will formulate hypotheses for an exit analysis that contributes to our understanding of the ecology of album publishers in The Netherlands and Belgium. Relevant variables that are available in our database are related to the nationality of the publisher, product portfolio width, and density delay.

#### **5.4.2.2 *Nationality***

In the previous chapter we described the historical developments of comics and their publishers in The Netherlands and Belgium. It became clear that Belgium has played an important historical role in the development of comics and the introduction and diffusion of the album format. Belgian comics were popular within the country itself, and after the Second World War especially Wallonia has become an important exporter of comics (magazine and albums). In contrast, a large part of the Dutch comics market has been depending on import (mainly from France and Belgium) already since the 1960s. The number of Dutch comics that are exported is small. In general the climate for comic albums and their producers is more positive in Belgium than in The Netherlands. Therefore we expect:

**HYPOTHESIS 1** *Having the Belgian nationality shows a positive relationship with the publishers' chances of survival, whereas the opposite holds for publishers having the Dutch nationality.*

#### **5.4.2.3 Product portfolio width**

Differentiation of products can contribute to the success of an organization, as has been shown already in numerous earlier studies (a.o. Wezel and Van Witteloostuijn, 2006). For comic album publishers it can be important to have a broad production line, because it allows them to not only respond to the demand for comic books, but also to increase this demand. Next to that, every space a publisher fills in the shelves of comics stores and book stores cannot be filled by their competitors. The advantages of broad publishing are larger than the liability of cannibalism (products from the same organization that form a substitute for each other).

Every album a publisher releases is a new product, and therefore the numbers of published albums are an indicator of the publishers' product portfolio width. Another variable in our database that might be useful for this purpose concerns the numbers of artists involved in the creation of the albums and the series. Publishers of comic albums especially stimulate a sustainable demand for their products by publishing their books in series. It can take a while before series become popular, but if they do consumers will often continue buying the albums that appear in their favorite series. If they discover a series after it has started and appreciate it, they are likely to buy the earlier volumes, as well as the parts that still have to appear. Also, regular comics buyers tend to buy volumes of more series at the same time. The real fans collect comics, and want to have their series complete.

The names of series can be seen as labels or brands in the marketing strategies of comics publishers, as we saw in the previous chapter. During a relatively long period in the history of comics, names of creators played a less important role than the names of series in the marketing of comic albums. Only the most influential or productive artists became a 'brand' of their own. These were often artists that owned their own studio. Other artists who worked for them often stayed anonymously. The team-wise produced comics were only published under the name of the leading artist, for marketing reasons. The best known examples of such studios

in The Netherlands and Belgium are those led by Marten Toonder, Hergé and Willy Vandersteen.

Nowadays individual artists are more important in the policy of publishers (especially in the sub-niches of graphic novels and author's albums), but this is only a quite recent development. For these reasons we assume that series are a more valid variable to measure product portfolio width than artists and albums.<sup>1</sup> This leads us to the second hypothesis:

**HYPOTHESIS 2**    *The numbers of series that a publisher produces, have a positive, nonmonotonic relationship with his chances of survival.*

#### 5.4.2.4 Density delay

According to Carroll and Hannan (1989) organizations founded in a period with high organizational density have a higher hazard of exit than organizations that are founded in periods with lower density. This so-called density delay is caused by a scarcity of resources in those periods. Apparently organizations are not able to recover at a later age, because they do not succeed in finding new resources in the years after entry, and because of the enduring competition within their age-group. In the case of comics publishers these resources concern among others ownership of successful album series, licenses of successful series obtained from other (foreign) publishers, connections with those publishers and with talented artists (networks).

Our database does not contain information about the founding of the publishers, only about their entry in the niche. Nevertheless there might be similarities between the relation between age of founding and density on the one hand (earlier density delay research), and entry in the comics niche and density on the other (this

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<sup>1</sup> The variables series, albums and artists in our database are strongly correlated, as is shown in the next subsection (Table 5.7). It is impossible to conclude for our data whether either of these variables has more or less impact than the others on the hazard of exit of publishers. This means that if hypothesis 2 is confirmed, numbers of albums and artists will also have a positive, nonmonotonic effect on the organizational hazard of exit.

research). We assume that scarcity of resources has consequences for tenure in the comics niche, and that density at the moment of entry affects the tenure of publishers.

**HYPOTHESIS 3** *Density and hazard of exit show a positive, nonmonotonic relationship for organizations that enter the comics niche in periods with high density.*

### 5.4.3 Methodology

#### 5.4.3.1 Data

The same data are used as was the case for the entry-analysis. In Section 5.3 it was already explained how variables from the original database had to be edited before they could be used for the analyses. Some further editing was necessary for the exit analysis, and the data were re-organized for this purpose, as will be outlined below.

#### 5.4.3.2 *Dependent and independent variables: exits (dependent), albums, artists, series, density in year of origin, Belgian and Dutch publisher (independent)*

For an explanation of our definition and calculation of numbers of exits and density, we refer to Section 5.3. In the exit analyses, density will be related to the first entry (year of origin) of the publisher.

In Section 5.3 the differentiation in our data between exits by code (year of last publication of an organization when looking at its codes: one organization can have more codes, and thus also more exits) and company exits (year of last publication of an organization when looking at its name; in this modus every organization only has one exit) was already introduced and explained. For the same reasons as in the entry analysis, we choose for the first modus and measure exits by publishers' codes.

There is another exit modus that is relevant for the hazard of exit—analysis: organizations whose comics publications appear under several names, because of a merger or acquisition. These exits got a different code in our dataset ('Exit because of M&A'), to differentiate them from the 'pure exits'. This way they could be taken into account during the analysis.

The variables 'Belgian publisher' and 'Dutch publisher' speak for themselves. By far the most publishers in the database are from The Netherlands and Belgium (together 92% of the whole population), which makes it possible to measure the effects of Dutch and Belgian nationality on the hazard of exit.

The variable 'albums' refers to the numbers of albums produced annually by the publisher, and the variable 'artists' to the numbers of artists involved in its annual comics production. The variable 'series' needs some more attention here. In the original database all albums also have the name of a series, even if it contained only one volume, either because this was the intention at the moment of publication (albums with completed stories; the so-called 'one-shots'), or because originally planned sequels were cancelled. This can have several causes: low sales of the first volume, market exit of the publisher, contractual problems with artists or other publishers (in the case of licensed albums), etcetera. There are 1,688 single-volume series and 'one shot'-albums in the database. We now define a series as a range of albums of which at least two volumes have been published. In total, 2,395 out of 4,080 ranges of albums (albums that share the same denominator in the database) fulfill this condition. The volumes of all these series together amount to 24,982 albums (94% of all albums in the database). If a publisher produces albums that do not belong to a series in year  $x$ , the value for the variable 'albums' is the sum of the albums produced in that year, and the value for 'series' is '0'.

#### 5.4.3.3 *Control variables*

Just as in the entry analysis control variables will be included in the models. Most of them were already introduced: Net Domestic Income (NDI), Population, Industry tenure, Total production of book titles, Total album production.

We do not have information about the foundation of the publishers and thus we cannot include a control variable Organizational age, as is in the case in other



hazard of exit research. Our variable Tenure is measured by counting the years between first and last publication, for the codes that were given to the publishers (see Section 5.3). Working with codes provides us with more valid data about organizational density than would be the case if we based this on the names of the publishers. This means that publishers with more than one code (who have published with interruptions longer than five years) also have more than one tenure.

For a better comparison with earlier research concerning product portfolio width (Wezel and Van Witteloostuijn, 2006), we come as close as possible to their variable for economic influences GDP per Person by replacing our variables NDI and Population by the new variable ‘NDP per Person’.<sup>1</sup>

#### **5.4.3.4 Method and models**

The exit analysis-dataset was formed from the original database by using the variables mentioned above, and by selecting all publishers that have published series. For each year of their tenure the publishers, sorted by their code(s), got an observation (a record) in the dataset, starting with the year of first entry (‘origin’), and ending with the year of exit: the last year in which they published volumes of series. This implies that the dataset also contains records of years in which the publishers did not produce any series. However, due to the choices already made for the entry analysis (as explained in Section 5.3) this period was never longer than five years. If in the sixth year there was still no new publication of the publisher, it was automatically marked as ‘exit’.

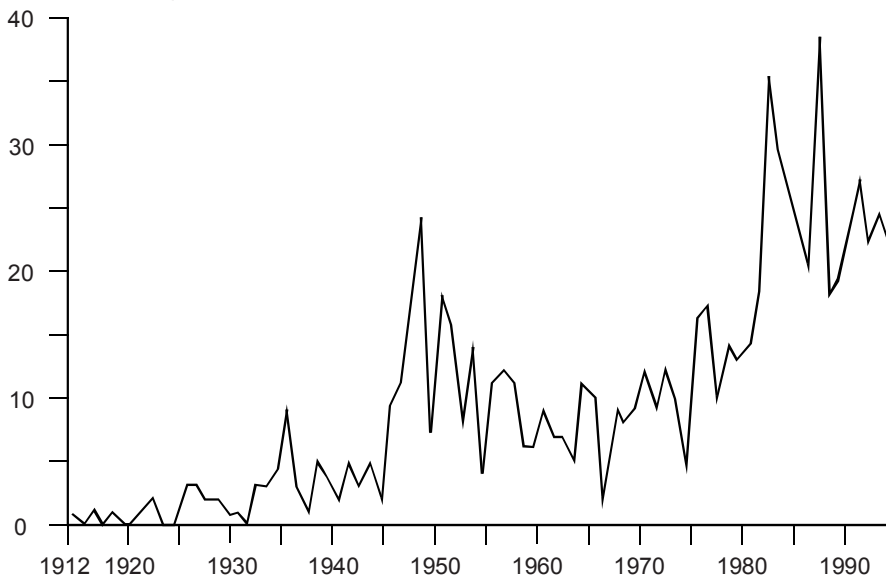
The exits are based on ‘pure exits’, i.e. the exits by a merger or an acquisition (M&A) are left out. We decided to do this, because if a publisher continues producing comics under another name as a consequence of an M&A, the tenure does not end, only the name of the organization changes. This choice will in fact hardly influence the outcomes of the analyses, because only eight exits by M&A were found for the publishers in the exit-dataset.

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<sup>1</sup> The choice for NDI instead of GDP was already motivated in Section 5.3: in the pre-World War Two years there were more data about NDI than about GDP.

In total the dataset has 4,234 observations, but this includes observations after 1994. If we leave these out, to prevent right censoring problems (see Section 5.3), there are still 3,775 observations. These concern the complete population: ‘real publishers’ and ‘hit & run’ publishers. For the ‘real publishers’ only there are 3,250 observations. The group of ‘hit & run’ publishers has a much smaller number of observations in the dataset (525, or 14% of all observations until the year 1994). This is partially caused by the lower number of hit & run publishers, and partly by the fact that they published less albums and series than regular publishers.

**Figure 5.8 Exits of album series publishers 1912-1994**



In the analyses we shall look at the outcomes for the whole period 1905-1994 as well as for the post-war years 1945-1994. We do this, because we found out that the comic album publishers only formed a niche since 1945 according to ecological principles (see Section 5.3), although albums and series had been published before the second world war. In our dataset there are only 297 observations in the period before 1945 (less than 8% of all observations in 1905-1994), which already shows that the industry was quite modest in comparison with the second half of the 20<sup>th</sup> century.

The exits by year (excluding those because of M&A) are shown in Figure 5.8 . In total 796 exits were counted in the period 1912-1994.

Just like in the case of entry analyses, exits can be seen as an event. If we want to find out what the causes are of events like these, event history analysis is the best method (Allison, 1984). Our dataset is suitable for analyses like these, because it takes into account all the time until the event takes place. For each year (year  $t-1$ ) in the publisher's life (the years between entry and exit), the likelihood is calculated that the exit takes place in the year after (year  $t$ ). This likelihood is also called the hazard rate. The assumed causes of exit (the independent variables) are already mentioned in the hypotheses. There are also alternative determinants: the control variables introduced above.

The technique that fits our aims best is Cox' proportional hazard model. Before we applied the Cox model in Stata (version 11.0), with the command 'stcox' (survival-time Cox), the data were declared to be survival-time data, by using the Stata command 'stset' (survival-time set). This command informs Stata of the key variables and their roles in the analysis: the 'exit'-variable, the 'year of origin' (first entry)-variable, and the variable for the identity or the organization (in our case the code of the publisher).

We added the Stata option 'nohr' ('not hazard ratios'), which specifies that coefficients are displayed rather than hazard ratios. For the interpretation of the results, this implies that variables with a (significant) negative coefficient also have a negative relation with the hazard of exit: these variables contribute to the survival chances (i.e. a longer tenure) of the organizations. In contrast, the variables with a (significant) positive coefficient have a positive relation with the hazard of exit: they worsen the survival chances of the publishers (i.e. shorten their tenures). Descriptive statistics for the independent and the control variables are shown in Table 5.6.

We tested the correlations between these variables (Table 5.7). Not so surprisingly the control variables 1 to 4 were just as strongly correlated as in the entry analysis. We can retain them in the models for the exit analysis, because of the different conditions for the Cox model in comparison to the negative binomial regression that was applied for the entry analysis.

**Table 5.6 Descriptive statistics exit analysis 1905-1994**

<b>variable</b>	<b>observations</b>	<b>mean</b>	<b>SD</b>	<b>min</b>	<b>max</b>
NDI per person	3,775	10.864	7.80472	0.21515	26.91503
industry tenure	3,775	117.6856	19.0317	54	142
total production of book titles	3,775	12,457.87	4,151.975	1,847	19,05
total album production	3,775	504.738	303.4975	1	1,168
Dutch publisher (yes or no)	3,775	0.623841	0.484485	0	1
Belgian publisher (yes or no)	3,775	0.326887	0.469138	0	1
series	3,775	1.092715	2.519744	0	38
albums	3,775	5.72	13.38547	0	174
artists	3,775	2.430993	5.626979	0	62
density in year of origin	3,775	59.62967	32.01724	1	109

Table 5.7 Correlations between variables

	1	2	3	4	5	6	7	8	9	10
1. NDI per person	1									
2. industry tenure	0.9314	1.000								
3. total production of book titles	0.9466	0.9558	1.000							
4. total album production	0.9321	0.9255	0.8973	1.000						
5. series	0.0568	0.0849	0.075	0.0843	1.000					
6. albums	0.0736	0.0957	0.0883	0.0958	0.9117	1.000				
7. artists	0.104	0.12	0.1104	0.1206	0.8334	0.8489	1.000			
8. density in year of origin	0.7815	0.7768	0.7444	0.7828	-0.1477	-0.1612	-0.1048	1.000		
9. Dutch publisher	-0.1803	-0.1846	-0.1705	-0.1711	-0.0886	-0.1242	-0.1201	-0.1246	1.000	
10. Belgian publisher	0.1868	0.1944	0.1786	0.1768	0.1162	0.1461	0.1383	0.162	0.8904	1.000

It appears that the independent variable density in year of origin (variable no. 8) and the control variables (no.1 to 4) have correlations higher than 0.5. This means that we have to be careful with the interpretations of the density delay analysis.<sup>1</sup>

All three independent variables for product portfolio width (the variables series, albums and artists with the numbers 5, 6 and 7) are strongly correlated. It appears to be impossible to conclude whether either of these variables has more or less impact than the others on the hazard of exit of publishers. The collinearity implies that if hypothesis 2 is confirmed, numbers of albums and artists will have the same effect on the organizational hazard of exit.

Finally, Dutch and Belgian publishers (variables numbers 9 and 10) are also strongly correlated, but in their case negatively, which is logical. They do not exclude each other completely (in which case the correlation would be -1), because a small number of publishers has both nationalities. Because of this correlation, we shall test the effect of nationality for Belgium only. If the results are significant, this means that they will also be significant for Dutch publishers, but in the opposite direction.

All other correlations are lower than 0.5.

#### 5.4.3.5 *Excursion: a demography of tenures*

The dataset based on the choices described above, is necessary for the analyses, but also provides us with possibilities to get more insight into the tenures of comics publishers in general. The most relevant aspects are described here. The focus is on the real publishers.

Only a small number of publishers have a long tenure: no more than four publishers have been active in publishing album series since more than 50 years (counting backwards from 1998: the last year in which the exit data are reliable). Table 5.8 contains a 'Top 10'-list of the ten publishers with the longest tenures. Al-

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<sup>1</sup> In an earlier version of this analysis two other variables were included: density and density<sup>2</sup>. These were also highly ( $> 0.5$ ) correlated with the control variables and with density in year of origin, and because of that were left out in the final analysis.

though for the hazard of exit analysis the codes for the publishers will be used, for this list it makes more sense to mention names of the organizations, and count the tenures of publishers with more than one code. The tenures of publishers that changed names because of a merger or acquisition (M&A) are added. The first M&A-cases in the Top 10 list concerns two Dutch publishers that merged into VNU in 1965: De Spaarnestad and De Geïllustreerde Pers, which both had their first album publications in 1937. The second case is Lombard, which started publishing comic albums in 1950 and was acquired by Média Participations in 1986.<sup>1</sup>

**Table 5.8 Top 10 of album publishers with longest tenures, by publishers' names**

<b>publisher (with country of origin)</b>	<b>total tenure (in years)</b>	<b>publisher (with country of origin)</b>	<b>total tenure (in years)</b>
Standaard Uitgeverij (FI)	63	Het Volk (FI)	49
De Spaarnestad / De Geïllustreerde Pers / VNU (NI)	62	Lombard / Media Participations (W/Fr)	49
Dupuis (W)	61	De Vlijt (FI)	38
Casterman (W)	53	Helmond (NI)	35
De Bezige Bij (NI)	50	H.J.W. Becht (NI)	33

Counting of tenure started with the year of first album publication in the database, last year is 1998. Tenures from publishers with more than one code were added.

Publishers in the Tenure Top 10 like Standaard, Dupuis, Casterman, Lombard/-Média Participations and the VNU-publishers have been very active and influential in the comics niche, Dutch and Flemish publishers especially in their home countries, Wallonian publishers internationally.

Standaard has become the largest comics publisher in Flanders, but also has a large share in the Dutch market, because of the popular Suske & Wiske-albums. The VNU group was by far the largest comics publisher in The Netherlands for decades. The Wallonian publishers Dupuis, Casterman and Lombard were active in

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<sup>1</sup> Dupuis was acquired by Média Participations after 1998.

all French and Dutch speaking countries. Among the ten publishers Lombard is the only de novo comics publisher.

De Bezige Bij, De Vlijt, Het Volk and especially H.W.J. Becht limited their activities in this niche to a smaller number of series and albums. They did this for a long time, although sometimes with longer interruptions. Becht is hardly known as a comics publisher. This is not so strange, since they only published two comics series, among which were a number of reprints of Töpffer's evergreen *Monsieur Cryptogame* (in Dutch *Mijnheer Prikkebeen*). The tenure of the Dutch publisher Helmond is in some ways exemplary of the growing dependence of Dutch comics publishers on foreign comics. Already in the period 1934-1948 Helmond published a number of comic albums, all of Dutch origin. Then there was a long period in which no comics were published, until 1962: then they re-entered the comics niche, but only with translations of Lombard albums for the Dutch market. They kept publishing licensed Lombard-translations until the end of the 1970s. After that collaboration had ended, they only published comic albums sporadically.

**Table 5.9 Tenures of 'real' album publishers in six groups, by publisher codes**

tenure	number of publisher codes (N=764)	percentage of population	cumulative percentage
1	322	42.1%	42.1%
2 - 5	286	37.4%	79.6%
6 -10	77	10.1%	89.7%
11 - 20	55	7.2%	96.9%
21 - 50	20	2.6%	99.5%
> 50	4	0.5%	100.0%

Tenure starting with the year of first album publication in the database, counted until 1998.

Above we used the names of the publishers from our database. The codes are more useful if we want to sort all the publishers in the database, including those with exits, by tenure group. Again we limit our observations until the year 1998. We divide the tenures into six groups: a tenure of 1 year, 2 to 5 years, 6 to 10 years, 11 to 20 years, 21 to 50 years, and finally of 50 years and longer. In Table 5.9 we see



that 42% of all publishers' codes only have a tenure of 1 year. However: this includes publishers who have entered the market in 1998, the last year that was measured. This amounts to almost 80% of all publishers if we add the percentage of this group to that of the 2 to 5 years-group. This means that only 20% has a tenure longer than 5 years. The average tenure, measured by publisher's code, is 4.4 years.

If we separate the organizations that actually have stopped publishing comics from organizations that are still active, we get an insight in the length of the tenures of that first group. We filter the publishers' codes with exits, and again sort them by tenure group (Table 5.10). All exits until the year 1994 are counted, using the data until 1998 (the last year in which they were reliable). In total there were 587 exits. Most publishers with an exit already left the niche after one year (51%) or after two until five years (35%) after their entry. Less than 15% exited at a tenure longer than five years. In average an exit within the group of publishers' codes whose tenure has ended, occurs after a tenure of 3.2 years.

**Table 5.10 Tenures of 'real' album publishers with exits in five groups, by publisher codes, at year of exit**

tenure	number of publisher codes (N=587)	percentage of population	cumulative percentage
1	302	51.4%	51.4%
2 - 5	206	35.1%	86.5%
6 -10	42	7.1%	93.6%
11 - 20	27	4.7%	98.3%
> 20	10	1.7%	100.0%

Now we can also calculate 'half life': the age at which half the population has exited. In our case this does not refer to the age of failure, but to the length of the tenure at which half of the population has left the comics niche. The total number of publisher codes counted until 1994 is 677. Half of 677 are 339 (rounded). Of this group 302 publishers codes had a tenure of 1 year, the remaining 37 had a tenure of two years. So half life is already reached at a tenure of 1.11 year (one year and forty days). This would be even shorter if the hit & run publishers were also counted. Although 'end of tenure' is not the same as 'exit by failure' this low

‘half life’ is comparable with that of failure exits in other industries, as mentioned by Hannan (2005, p. 55).

After this descriptive excursion we’ll continue with the results of the analyses.

#### 5.4.4 Findings

At first we will present the findings for the real publishers, and then compare them with the results for the whole population (including the hit & run publishers). Table 5.11 shows the models used for the testing of our hypotheses for the real publishers. Model 1 only contains the control variables, model 2 adds the independent variables, and model 3 has the same variables as model 2, but the time-span is limited to the post-war period 1945-1994.

In model 1 the coefficients of the control variables NDI per person and total album production have significant values. The negative coefficient for NDI per person suggests that a higher degree of prosperity contributes to the survival chances of comics publishers. Total album production has a negative effect on organizational survival: the more albums are produced by the whole population, the higher the chance that a publisher leaves the niche. This might be caused by competition.

In the second model the independent variables Belgian publisher, series and density in year of origin are added. All three of them have a significant effect on the hazard of exit. The coefficients of the control variables NDI per person and total album production are also still just as significant.

Having the Belgian nationality has a significant, positive effect on the survival of a publisher. As we already explained, because of the strong negative correlation (-0.9172) between Belgian and Dutch nationalities of publishers, this means that the Dutch nationality of a publisher has a comparable effect, but in the opposite direction: Dutch publishers have a higher chance of exit.<sup>1</sup> Thus, our first hypothesis

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<sup>1</sup> The coefficient for ‘Dutch publisher’ is just as significant (with  $p \leq 0.01$ ), but has a positive value. To be more precise: if the variable ‘Belgian publisher’ is replaced by ‘Dutch publisher’ in the same model the coefficient is 0.280422 with a standard error of 0.0843582.

Table 5.11 Proportional hazard estimates for exit rates 1905-1994; only ‘real’ publishers

period	model 1		model 2		model 3 (1945-1994)	
	coef	SE	coef	SE	coef	SE
variables						
NDI per person	-0.094126 ***	0.0205165	-0.1208924 ***	0.0219469	-0.1400302 ***	0.0298748
industry tenure	0.011179	0.0068646	0.010599	0.0069684	0.0274877 **	0.0119817
total production of book titles	-0.0000444	0.00003	-0.0000348	0.00003	-0.0000666 *	0.0000382
total album production	0.0015838 ***	0.0004102	0.0014718 ***	0.0004196	0.0011697 ***	0.0004473
Belgian publisher			-0.2779147 ***	0.0888539	-0.2353171 ***	0.0901895
series			-0.2134944 ***	0.0430683	-0.2115346 ***	0.0456129
density in year of origin			0.0074006 ***	0.0026486	0.0097433 ***	0.0033029
exits	587		587		526	
log pseudo- likelihood	-3471.3991		-3453.5335		-3051.0102	

\* p ≤ 0.1  
\*\* p ≤ 0.05  
\*\*\* p ≤ 0.01

SE = Standard Errors

(Having the Belgian nationality shows a positive relationship with the publishers' chances of survival, whereas the opposite holds for publishers having the Dutch nationality) is confirmed.

The number of series produced by a publisher also contributes positively to the survival chances of a publisher. In other words: the more series a publisher produces, the bigger the chance of a longer tenure. Our second hypothesis (*The numbers of series that a publisher produces, have a positive, nonmonotonic relationship with his chances of survival*) is confirmed. As a consequence of the high collinearity between series, albums and artists, this implies that the same conclusions can be drawn for the numbers of albums and numbers of artists.<sup>1</sup>

The third independent variable 'density in year of origin' also shows a significant relation with the survival chances of publisher, but this effect is negative for survival chances: the higher the density is at the time of entrance in the comics niche, the higher the hazard of exit for that organization.

In the previous subsection we saw that density and the four control variables were strongly correlated (all correlations higher than 0.7). Therefore we should be careful with drawing conclusions with regard to our third hypothesis: *Density and hazard of exit show a positive, nonmonotonic relationship for organizations that enter the comics niche in periods with high density.*<sup>2</sup> The results from the analysis suggest that it can be confirmed. The findings from earlier research about the effect of scarcity of resources at the time of founding on the age of organizations appear to be applicable to respectively entry and tenure of organizations within a niche.

In model 3 (the period 1945-1994) the same kinds of effects (positive and negative) are visible, but with a few differences with regard to the levels of significance: the

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<sup>1</sup> The coefficients for artists and albums are just as significant (with  $p \leq 0.01$ ) as series. To be more precise: if the variable 'series' is replaced by 'artists' in the same model the coefficient is -0.1185716 with a standard error of 0.0209035, and if it is replaced by 'albums' the coefficient is -0.049174 with a standard error of 0.0115343.

<sup>2</sup> In an earlier version of this analysis two other variables were included in the analysis: density and density<sup>2</sup>. These were strongly correlated to the control variables and to density in year of origin and for that reason were left out. If they had been included in the models, the effect for density in year of origin would not be significant.

Table 5.12 Proportional hazard estimates for exit rates 1905-1994; whole population ('hit & run' and 'real' publishers)

period	model 1		model 2		model 3 (1945-1994)	
	coef	SE	coef	SE	coef	SE
variables						
NDI per person	-0.086011 ***	0.0174346	-0.1058276 ***	0.0186574	-0.1293362 ***	0.0257037
industry tenure	0.0147085 ***	0.0057171	0.0144421 **	0.0058087	0.0319288 ***	0.010428
total production of book titles	-0.0000493 *	0.0000254	-0.0000405	0.0000257	-0.0000679 **	0.0000323
total album production	0.0013203 ***	0.0003393	0.0011999 ***	0.000357	0.0009089 **	0.0003857
Belgian publisher			-0.2303544 ***	0.0743188	-0.1972992 ***	0.074907
series			-0.1965432 ***	0.0372121	-0.1896601 ***	0.0389478
density in year of origin			0.0054177 **	0.0023293	0.0079258 ***	0.0029073
exits	796		796		717	
log pseudo- likelihood	-4938.0823		-4920.9651		-4377.911	

\* p ≤ 0.1  
\*\* p ≤ 0.05  
\*\*\* p ≤ 0.01

SE = Standard Errors

coefficients of the control variables industry and total production of book titles are now also significant, whereas they were not in the first two models.

Table 5.12 presents the same models for the whole population: ‘real’ publishers and ‘hit & run’ publishers.

If we compare the findings for the whole population with those of the ‘real’ publishers only, we see that the main differences concern the levels of significance of the control variables industry tenure (in all three models lower for the real publishers only than for the whole population) and total production of book titles (in models 1 and 3 lower for the real publishers than for the whole population). The coefficient of the control variable total album production is less significant for the whole population than for the real publishers in model 3. In model 2 the coefficient of the dependent variable density in year of origin is less significant for the whole population than for the real publishers. The directions of the coefficients (positive or negative) and the significance of the effect of the other independent variables are the same for both populations. Just as in the entry analysis, the influence of the hit & run publishers is relatively small.

#### **5.4.5 Discussion and conclusions**

The ecological concepts proved to be useful to get more insight into factors that influence the hazard of exit for comics publishers. In our case an exit is not so much the failure of the organization, but only the end of its tenure in the comic album niche. This could be measured by the year of each publisher’s last publication in the database, and by stopping our measurements before the last year of the period that the database covered, in order to prevent right-censoring problems. Using our database we found three factors that each co-determine the length of the publishers’ tenure in the comics niche.

Firstly, nationality was an influencing factor. Being a Belgian publisher enhanced the chance of a longer tenure, whereas the Dutch nationality increased the chance of a shorter tenure for publishers. This supports a finding from the last chapter: historically Belgium is more a comics-oriented country than The Netherlands.

Secondly the numbers of series published, as an indicator for the product portfolio width of publishers, affect the survival chances of publishers. Numbers of albums produced and the numbers of artists involved are other variables for product portfolio width and have the same effect. In general one can say that the more a publisher produces, the higher the chances of a longer tenure. A limitation of this finding is that it proved to be impossible to differentiate between the three product portfolio widths variables with regard to their individual influence: they were too much correlated.

The database does not contain information about the size of the publishers. If product portfolio width is related to organizational size, the variables series, artists and albums would be measures for the effect of size on an organization's survival chances. Most comics publishers are small. In the Top 10 of most productive album publishers shown in Chapter 4 (Table 4.2) there are three that belong to the smaller publishers (Arboris, Talent, Loempia), that is these are/(have been) independent *de novo* publishers that have/(had) less than ten people working for them. The fact that they are in this Top 10 shows that small publishers can be productive. In these cases product portfolio width is not a measure for size. However, we do not know for sure whether these small and productive publishers are exceptions.

A third finding was about density delay: just as in other populations, the density at the time of entry in the niche influences the length of the publishers' tenures: the more crowded it is in the niche at the time of first publication, the bigger the chance that the publisher will have a shorter tenure in the comics niche, in comparison with entrants in periods with a lower density. This is related to a scarcity of resources in high density periods, which leads to a fiercer competition. A major limitation for this analysis was that the independent variable density in year of origin and the control variables were correlated. Although there are indications that our proposition can be confirmed, we cannot be completely certain about this.

## 5.5 CONCLUSIONS

In this chapter we applied concepts from organizational ecology to the comics publishers in The Netherlands and Belgium. We especially focused on the publishers of comic albums.

The identity of a niche is formed by the origin of the publishers in that niche. Our findings showed that during a long time publishers that were not specialized into comic albums but a different background, formed the majority in the population. For these *de alio* organizations comics were a secondary order, derived product. *De novo* comic publishers, which are specialized into comics, have only outnumbered the *de alios* since quite recently. Their presence will have had less impact on the perception of comics among a general audience than the activities of the *de alios*. The long-during lack of legitimacy of comic albums as an independent cultural medium is not only caused by properties of the medium itself, but also by the identity of the organizations involved in their production.

Especially after World War Two the comic albums niche started to grow. Incumbent organizations attracted newcomers and provided the niche with legitimacy. Competition gradually became more important, especially since the 1980s. The comic album niche has had a dual market structure for a long time, with a few large publishers that publish comics for a general audience, and many small organizations that publish a large variety of comics for smaller target groups. Gradually the role of the generalists has become more modest, and the specialists produced a larger part of the album supply. This suggests a development into the direction of a fragmented market structure, but at the end of the 20<sup>th</sup> century the overall image is still that of a dual market structure.

Most comic album publishers are active for a relatively short period. Half of the population already stops publishing comics after a year. Belgian publishers had a higher chance of a long life in the comics niche than Dutch publishers. The finding from the last chapter that historically Belgium is a more comics-oriented country than The Netherlands is now confirmed statistically. Publishers cannot change their country of origin, but there is another thing they can do to enhance their chances of survival: publish more series and albums than others. Publishers who do this have a significantly higher chance to live longer than publishers that produce albums occasionally.

Apart from these factors, that are significant for the whole population, there will be other factors that influence the behavior of individual publishers in the comic album niche. But such factors are outside of the scope of ecological analyses. We can however use qualitative sources to get a deeper understanding of the demographic developments in the comics publishers' population in The Netherlands and



Belgium, by focusing on cases from the population of Dutch and Belgian comics publishers. This is what we will do in the next chapter.

# CHAPTER 6

## CASES OF PUBLISHERS

### 6.1 INTRODUCTION

The previous chapter showed how the population of comics publishers developed in The Netherlands and Belgium, and which variables played a crucial role in the entry and exit of publishers. Statistical analytics can test assumptions about these demographical phenomena on a general level, by showing whether and which variables are related to each other significantly, but what they cannot do is provide a deeper understanding of the motives of an individual company. Why does an individual or a company start and stop with publishing comics, have there been different motives in the course of years, and are there any differences between The Netherlands and Belgium, or differences between companies that are striking? We want to know more about the evolutions of the medium and the role of individuals in the comics world, as well as about the interaction between publishers, artists and other audiences. This chapter will pay attention to these subjects, in four case studies. Propositions derived from the theory in Chapter 2 in combination with the findings from Chapters 4 and 5 will be explored in case analyses. The methodology and the data for the case studies have already been described in Chapter 3.

The next Section (6.2) introduces the propositions. After that the cases follow: the Dutch publishers VNU (Section 6.3) and Oog & Blik (Section 6.4), and the Belgian firms Dupuis (Section 6.5) and Bries (Section 6.6). The findings are compared, discussed and related to the propositions in Section 6.7. Finally Section 6.8 gives a summary of the chapter. The information in this chapter will be used in the next, synthetic chapter, together with the findings from the Chapters 4 and 5.

## 6.2 PROPOSITIONS FOR THE CASE ANALYSIS

The propositions for the case studies that are introduced here will especially allow us to differentiate: *within* the cases of Dutch and Belgian comics publishers, and *between* these case organizations; between organizational logics and individual value regimes; and between esthetic (or inspired) and market values.

### 6.2.1 Resource partitioning, resource based view and inertia

According to resource partitioning theory specialists are more active in the creation of innovations than generalists (Carroll, 1985; Mezias and Mezias, 2000). However, generalists can copy these innovations from specialists, as Huygens (1999) showed in his study of the popular music industry. They can do this by acquiring an innovative specialist company, or just by copying the specialist's innovative product and business model. As we saw in Chapter 3, specialists are comparable with *de novo* organizations: they focus on a narrow niche. In a similar vein generalists can be compared with *de alio* organizations: they are active in more niches at the same time, and make products for a broad audience.

The ratio between *de alio* and *de novo* organizations determines the identity of a niche (Hsu and Hannan, 2005). Since the 1980s the majority of the organizations in the comics niche is formed by *de novo* publishers (see Section 5.2). This means that they have become more important for the identity of the niche than *de alio* publishers, who dominated the niche until then. In Chapters 4 and 5 we saw that this new identity was characterized by a change from magazine to albums logics. *De novo* publishers conquered their own resource space in the album market, but *de alio* publishers did not disappear completely from the population. We can expect that the remaining *de alio* publishers in the niche have adapted to the new circumstances by copying innovations from the *de novo* publishers. Their strategies have an exploitative character and the strategies of *de novo* publishers predominantly an explorative character. These assumptions lead to our first proposition:

**PROPOSITION 1 A** *De novo publishers introduce innovations with regard to comic albums that are copied by de alio publishers.*

The changes in the identity of the comics niche due to newcomers have consequences for organizations already active in that niche. Adaptations are necessary for former generalist magazine publishers that aspire to be active on the album market. This is also reflected by changes in the importance of resources. Barney (1991) made a basic distinction between property based and knowledge related resources that confer enduring competitive advantage to an organization. Miller and Shamsie (1996) refined Barney's resource based view by adding a second dimension: the level of certainty of the environment. By researching the Hollywood film industry in the period 1936-1965 Miller and Shamsie discovered that in an uncertain (dynamic) environment organizations equipped with knowledge based resources have a competitive advantage vis à vis other companies, whereas in a certain (stable, predictable) environment organizations equipped with property based resources have a competitive advantage relative to other companies.

In the Chapters 4 and 5 we saw that in the comics niche the environment of the album market is more unpredictable and dynamic than that of the magazine market. For (de alio) magazine publishers property related resources (ownership, long term contracts with artists) will dominate, whereas for (de novo) album producers knowledge related resources (editors who have networks with artists, publishers, and other actors) will be more important. Former magazine publishers that aspire to fit into the logics of the album market will have to adapt their structure in order to be able to acquire the new resources. Album editors need the capability to discover new talents continuously, to negotiate with other publishers for cooperation or for licenses, and eventually to find additional resources that enable these publishers to cope with the fragmented album market.

De alio publishers are often larger, more formalized and more bureaucratic than the average de novo publisher. This slows down their ability to adapt to changes in the environment. They can adapt to a certain extent, but they will react slowly to changes like the ones on the albums market that ask for structural changes. This principle is called organizational inertia by OE researchers (Hannan, 2005). Although inertia seems to be a disadvantage for a company, it is in fact a protective mechanism: research showed that organizations that did change their structures drastically had an increased hazard of exit (Hannan and Freeman, 1977, 1984). If we apply this knowledge to the comic album market we expect that:

**PROPOSITION 1 B** *De novo publishers are able to adapt to changes in the album market more effectively and faster than de alio publishers.*

### 6.2.2 Values and organizational form

De novo publishers are founded a primary aim of publishing comics. This is not the case for de alio publishers: by definition they have their origin in other niches. In the era of the de alio publishers comics attained a level of legitimacy, in Suchman's (1995) terms legitimacy of the cognitive and pragmatic types. This was based on market and industrial values. In the de novo age the market for comic albums mainly addresses adolescent and adult comics fans. For adult audiences the artistic aspects of comics are more important than for the average children's comic. De novo publishers have to convince talented artists that they are their most suitable partner and would fit perfectly on their publishing list. Positive reviews in newspapers and magazines are not only important because they promote the sales of albums, but also because they can contribute to their symbolical production (Bourdieu, 1993), especially if they are published in quality newspapers. Each sub-niche in the fragmented album market is small, and therefore additional resources like grants from governments (for artists or for the production of the books) are not only welcome, but can even be a condition for survival. If governmental support is involved, institutions have to be convinced that it is morally legitimate (Suchman's third type of legitimacy; Suchman, 1995) that comics can be works of art, and deserve support, just as literature or visual art.

According to Boltanski and Thévenot (1999) differing value regimes can be used by the same organization, depending on the context. For de novo publishers it can be necessary, both substantially - as a consequence of their own ideals, and instrumentally - for strategic reasons, to negotiate inspired and esthetic values with their audiences: artists, fans, experts (reviewers and critics in newspapers and magazines) and governmental institutions. At the same time the publishers use market and industrial values in their contacts with other actors, like distributors. In using this combination of values they are comparable with symphony orchestras (Glynn and Lounsbury, 2005) and other arts organizations (Daigle and Rouleau, 2010). Negotiating esthetic values is less known to de alio organizations, but also less

necessary for them. They focus on scale advantages, and mainly use market and industrial values.

**PROPOSITION 2 A** *De novo publishers will express more values related to esthetics and inspiration than de alio publishers, which will express more market and industrial values.*

If de alio publishers decide to adapt to the new identity of the comics niche, as formed by the de novo publishers in the album market, they will adjust the capabilities of their personnel, for instance by recruiting editors that are able to recognize and attract new, talented artists. These editors express more inspired values than the top management of the organization, for this is needed in contacts with their audiences (artists, editors from other publishers, fans and experts). In the management layer market and industrial logics dominate. This leads to a differentiation of individual values within the de alio company.

De novo publishers are often small companies where the editor is also the publisher, or where people with both functions work closely together, so here less variation of values can be expected. Moreover de novo publishers have often been founded as a consequence of inspired values: publishing comics as an ideal. So, even if the de novo organization is larger, there will be less differentiation of values in comparison with de alio publishers. This leads to the next proposition:

**PROPOSITION 2 B** *Within de alio publishers there will be a higher variety of individual values than within de novo publishers.*

### 6.2.3 Societal effect

Organizations are embedded in a society that has developed its own identity in the course of history. The comics publishers in our case studies also have a country of origin, so it can be expected that the publishers in The Netherlands and Belgium evolve in different ways, although they belong to the same organizational type and produce the same kind of comics. National institutions will have an impact on producers from abroad, and directly and indirectly will influence the success of their products. We will compare the publishers from both countries with each other, in order to discover similarities and differences.

As was already introduced in the theoretical chapter, we shall use concepts from comparative historical institutionalism (CHI) for this purpose. We have to be careful with our interpretations of analyses based on CHI, because we can explore on the propositions only with a small number of case organizations that are from one industry, whereas the theory is based on *all* firms from *all* industries in a country.

Whitley's (1999) ideal typology of national business types, which makes a comparison possible between countries, was tested and extended by Hotho (2009). Hotho relates Whitley's key institutional features to indicators from the *Global Competitiveness Report* (the edition of 2000, published by the World Economic Forum). These features are shown in Table 6.1, together with the clusters that are the result of Hotho's cluster analysis and Whitley's original business systems. Only the business systems and clusters are shown that The Netherlands, Belgium and France belong to. France is included, because of the many links between Belgian, Dutch and French comics publishers.

Hotho's cluster 2, to which Belgium belongs, has many similarities with Whitley's collaborative type. Cluster 3 includes France, and is comparable with Whitley's state - organized system. Cluster 1 is a new type, not present in Whitley's typology. The Netherlands belong to this cluster, together with other Northern European countries. Some of their institutional features are similar to those of the collaborative system, other features are shared with the compartmentalized system of the Anglo-Saxon countries (not shown in the table).

For our purposes mainly the role of the state as an institution is relevant. As we saw earlier the Dutch and Belgian state support comics artists, which can be of vital importance for the more idealistic *de novo* publishers, and also for the artists themselves. Without these subsidies most of them would be forced to stop drawing comics. Is it possible to explain the differences between the behaviors of the three states with regard to innovative comics publishers by using concepts from comparative historical institutionalism? If this is confirmed in the case analysis, it could also be relevant for other cultural industries.

The first indicator of the institutional feature the state, Hotho's *Strength of state coordination* (see Table 6.1) is actually a combination of two indicators from his data: the independence of government policies from elites and special interest groups, and the extent to which government subsidies promote competition. On the

Table 6.1 Hotho's clusters and Whitley's matching business systems of The Netherlands, Belgium and France

institutional features	cluster 1 The Netherlands	cluster 2 Belgium	collaborative	cluster 3 France	state - organized
<i>the state</i>					
strength of state coordination: - <i>independence of government policies</i> - <i>government subsidies</i>	low	considerable	considerable	considerable	high
incorporation of intermediaries	considerable	high	high	low	low
strength of market regulation	low	considerable	high	some	high
<i>financial system</i>					
capital market or credit based	mixed	credit to mixed	credit	mixed	credit
<i>skill development and control</i>					
strength of public training system	high	considerable	high	low	limited
union strength	some	high	high	some	low
<i>trust and authority</i>					
trust in formal institutions	high	considerable	high	limited	limited
paternalist authority	low	limited	low	high	high

This table is based on Table 3.7 from Hotho (2009, p. 61) [My additions to the original table have been rendered italic and are explained in the text - RdV].



combined indicator The Netherlands score ‘low’, and Belgium and France score ‘considerable’. Therefore we can expect that:

**PROPOSITION 3 A** *Comics will be supported financially by the government earlier and more substantially in Belgium and France than in The Netherlands.*

The extent to which the state has regulated the market is another important issue for de novo comics publishers that enter the market. A highly regulated market could make it problematic for a newcomer from a non-institutionalized niche (i.e. a de novo comics publisher) to survive.

The last indicator of the institutional feature ‘the state’ is the strength of the market regulation. In The Netherlands this institutional variable scores ‘low’, in Belgium it scores ‘considerable’ and in France ‘some’. With regard to the impact of the level of market regulation on comics publishers we therefore expect that:

**PROPOSITION 3 B** *De novo comics publishers will have easier access to the market in The Netherlands than in Belgium and France.*

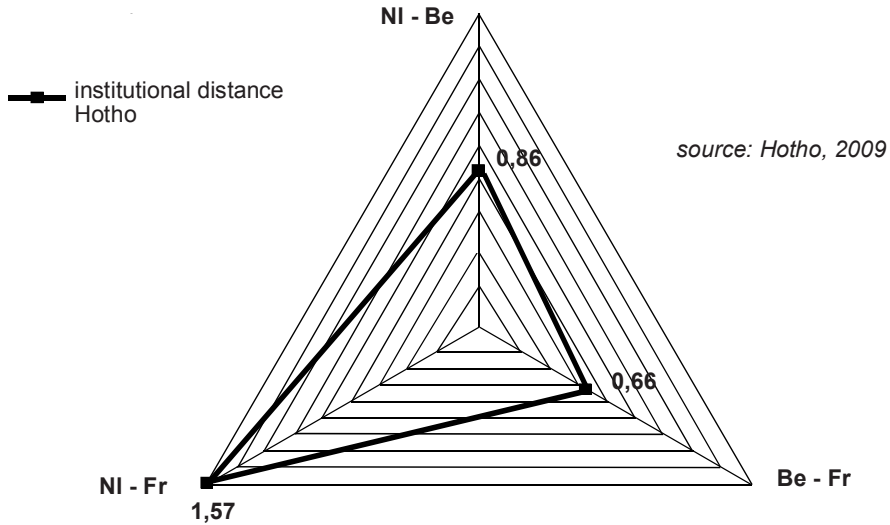
Hotho developed a measure for institutional distance between countries that can be used for research of international activities of organizations (see Chapter 2). By using the measure we can compare the institutional distances between The Netherlands, Belgium and France. Hotho offers a table with all the distances between the thirty countries from his sample (2009, p. 133). The distance between The Netherlands and Belgium (0.86) is larger than the distance between Belgium and France (0.66). The distance between The Netherlands and France (1.57) is much bigger than both other distances (see Figure 6.1). Belgium and France are closer than The Netherlands and Belgium. Institutional distances between countries can influence foreign direct investment of companies. Therefore we expect that:

**PROPOSITION 3 C** *Belgian comics publishers will have more foreign direct investments in France than in The Netherlands.*

Theoretically a second proposition (3 D) based on institutional distance could be added, about the expected differences of Dutch foreign direct investments in Belgium and in France, but (as we will see in the next sections) both Dutch case organizations only licensed (some of) their comics to France and Belgium; there

was no foreign direct investment on the area of comics. With this knowledge such a proposition would make no sense.

**Figure 6.1** Institutional distances between The Netherlands, Belgium and France



In our analysis of proposition 3 C we shall take into account other possible factors that can explain differences between foreign direct investments by Belgian firms in both countries, like geographical proximity between the three countries, historical ties and the sizes of the markets.

The propositions from this section will be explored in Section 6.7, after the four case descriptions.

## 6.3 VNU<sup>1</sup>

### 6.3.1 Introduction

The publishers that were united in VNU ('Verenigde Nederlandse Uitgeversmaatschappijen': Dutch United Publishers) at the end of 1964, for a long time were by far the largest producer of comics in The Netherlands. Not only that, they also dominated the Dutch world of magazines for a general audience. The two merger partners within VNU were De Spaarnestad, founded in 1906 in Haarlem, and Cebema, a family business already founded in 1844 in 's Hertogenbosch, whose publishing company De Geïllustreerde Pers was settled in Amsterdam. Both were publishers of catholic origin, who originally had started as printing companies. They had extended their activities with publishing companies, and published catholic as well as 'neutral' magazines and newspapers. Financial problems of the catholic newspaper *De Tijd* were one of the (many) reasons for their merger, so their ideological background sometimes influenced their business decisions. Nevertheless the other reasons for the merger had a more general strategic background. Both of them had been publishing comics, magazines as well as albums, a long time before the merger.

In 2001 VNU sold all their magazines to the Finnish magazine publisher Sanoma. By then VNU had become an enormous company, for whom the magazine market was too fragmented and unpredictable. At that time, the only comics that VNU still published were the magazines *Tina*, *Donald Duck*, and other Disney comics. Already a decade earlier their other comics production was sheltered at Big Balloon, a specialized comics spin-off of VNU's former youth and comics division imprint Oberon.

For this case study a variety of sources was used. The primary sources were formed by interviews with former editors and publishers at VNU, Oberon and Big Balloon (see Appendix I for a list of interviewees).

Among the most relevant secondary sources were articles and interviews in general magazines (*De Journalist*: Van der Linden, 1994), in magazines and books about comics (especially in *Stripschrift*: Van den Boom, 1977, and in the *Stripjaar*-

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<sup>1</sup> Appendix III contains a table with an overview of the evolutions at VNU.

*boeken*: yearly overviews of developments in the Dutch and international comics niche; see Van den Boom and De Raaf, 1986; Daalder, 1991; Schifferstein, 1998; Schifferstein *et al.*, 1996, 1999 and 2000; and De Weyer, 2005). Books and articles about the history of Dutch comics were studied (De Waal, 2008; Kousemaker and Kousemaker, 1979; Matla, 1998; and 2000, Pollmann, 1999), as well as a report made on behalf of VNU (Marktonderzoek Reeskamp, 1973), and a monography about VNU (Johannes and Cohen de Lara, 2005). The latter source gives an extensive overview of VNU's history, but comics get only little attention. Although VNU played an important role in the history of comics in The Netherlands, comics are only a small part within the history of the company itself.

For the quantitative information in this section the SDCN-database was used, Matla (1998), data from CBS (*Productiestatistieken Uitgeverijen*: sales of comic albums), HOI ('Instituut voor Media Auditing'; circulation of comic magazines), Stichting Spoorwerk betreffende het Boek (Book Research Foundation), and GfK Retail and Technology (sales of comic albums and books in general).

### 6.3.2 Entry

De Spaarnestad (DS) published catholic as well as 'neutral' magazines for a general audience. In this way the company enlarged its chances of survival. One of their magazines for a general audience was *Panorama* (founded in 1913; it still exists today). The combination of illustrations, photographs and often sensational news in *Panorama* formed attractive elements for a large audience. In order to become even more attractive, *Panorama* started an annex called *De Humorist*, with cartoons and comics. Part of this annex was meant to attract children. DS' most famous comics character *Sjors* made its debut in *De Humorist* in 1927 (De Waal, 2008, p. 119). *Sjors* was the Dutch translation of the original American comic *Perry Winkle*, drawn by Martin Branner. It was in fact one of the first comics from America that appeared in The Netherlands (De Waal, 2008, p. 119). At first this was done illegally, without a license from the original American publisher.

*Sjors* was also one of the earliest comics in The Netherlands with balloons, already the main format for American comics in that period, and filled a complete page (a so-called 'gag' comic). The main character *Sjors* was less innocent and childish than most of his Dutch counterparts. This contributed to a rising popularity of

*Sjors*. In 1930 this popularity led to a second, separate annex that was named after *Sjors* (Matla, 2000, p. 66)<sup>1</sup>. Under several names *Sjors* stayed an annex to *Panorama* until 1954. In that year it became an independent magazine. The originally American character of *Sjors* had slowly changed into that of a Dutch boy, especially since 1938, when a Dutch artist (Frans Piët) took over the comic. The independent magazine *Sjors* contained comics from England, Spain and France, but had contributions by Dutch artists like Frans Piët, Harry Balm, Bert Bus and Carol Voges. Especially Piët and Bus would be linked with *Sjors* (and Bus also with its successors) for decades.

In 1937 the first comic album published by DS was the second volume in the series around *Sjors* (the first volume was published by another publisher). It was followed by two others before the end of the war. These were the only comic albums derived from *Sjors* magazine that De Spaarnestad published at that time.

De Geïllustreerde Pers (DGP) was a working company of Cebema, the second partner in the VNU merger. This firm had also started publishing comics before the war: in 1936 they had published *Olijk en Vrolijk*, an annex for children to the magazine *In Woord en Beeld*, that a.o. contained comics. This annex was comparable with the *De Humorist* and *Sjors*, the annexes to *Panorama*. One of the most popular comics from *Olijk en Vrolijk* was *Gijsje Goochem* by the Dutch artist Jac Grosman. DGP published five albums of *Gijsje Goochem* before the war.

After the war DGP became more active in the comics field. This started in 1952 with the launch of *Donald Duck*, the most read Dutch comic magazine ever, which still exists today. *Donald Duck* was not an initiative of Disney or DGP, but was the indirect result of a strategy of the Scandinavian publisher Egmont, who had already started Disney magazines in Norway, Sweden and Denmark. Egmont was looking for extension of its market. The European representative of Disney preferred to spread the European licenses among more than one firm, to prevent a too strong position of the licenseholder, and after checking their capabilities (especially with regard to large scale distribution of a magazine) gave DGP their own license so that they could start with a Disney magazine without the interference of Egmont.

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<sup>1</sup> From the different sources it cannot be derived whether *Sjors* was an annex to *Panorama* or to another magazine since 1930. It is certain that it was an annex to *Panorama* since 1935 (Matla, 1998 and 2000; Kousemaker and Kousemaker, 1979, Van Eijck, 2010).

For DGP a magazine with Disney characters was attractive, because Disney's animated movies and the merchandising surrounding those movies were increasingly popular after the war. Even before the long films were produced (starting with *Snow White* in 1937), Disney had gained fame with his shorter films, in which a.o. *Mickey Mouse* and *Donald Duck* were introduced. Already in 1931 a comic strip with *Mickey Mouse* appeared in the Dutch newspaper *De Telegraaf*.

The magazine *Donald Duck* appeared as an independent magazine. Nevertheless it was consciously associated with *Margriet*, the widely read DGP-magazine for women (for instance by adding daisies to the logo of Donald Duck; *Margriet* is a girl's name, but also the Dutch word for daisy), and was also promoted in that magazine before its introduction. The first issue of *Donald Duck* was introduced by means of an enormous marketing campaign: every Dutch household received a copy of the magazine in a circulation of 2.5 million copies. Soon after its introduction it got more than 300,000 subscriptions. Until today the magazine has been able to keep this level of subscriptions: in 2009 the total circulation was 314,281 copies (HOI, 2011); in the 1970s it even had more than 400,000 subscribers.

Already in the 1950s DGP also started to publish albums with *Donald Duck* stories. In addition DGP published two *Tom Poes* albums by Marten Toonder. Since 1955 artists from the Toonder studios produced their own stories for *Donald Duck*, among which was a balloon version of *Tom Poes* (Van Eijck, 2010, p. 39). Later the artists from Toonder studios also produced many comics for *Donald Duck* with Disney characters.

The success of *Donald Duck* caused a more active attitude towards comics at DGP. A second comic magazine was introduced in 1962, as a follow-up for *Donald Duck*: *Pep*, which was meant for older children than *Donald Duck*, especially boys. This also had a reason: DGP saw how successful *Sjors* was, the magazine of their main competitor DS, and they also wanted to have a share of their market. In the first years *Pep* featured *Tintin*, but also *Mickey Mouse*. The formula was a rather unclear mix of comics for younger and older children.

### 6.3.2.1 Conclusion

DS and DGP entered the comics market, because they had discovered a new target audience for magazines: children. Comics were introduced as a part of the annexes to magazines for parents of the children. These annexes changed into independent comic magazines (*Sjors*, *Donald Duck*) after the war. One could say that in the entry period there was a coevolution between the marketing strategy of the publishers and the product: the fact that children were increasingly seen as a target audience of their own led to more independent formats for comics.

### 6.3.3 Evolutions

#### 6.3.3.1 Magazines

After the merger between the two partners Cebema and De Spaarnestad into VNU, DS and DGP continued to compete with each other, although since 1965 the publishers belonged to the same company. Both publishers had a very popular magazine for women (DGP: *Margriet* and DS: *Libelle*), a family magazine (DGP: *Revue*, later called *Revu* and still later *Nieuwe Revu*, DS: *Panorama*), and the comic magazines already mentioned above.

In 1967 DS introduced another comic magazine, this time focused on girls: *Tina*, which still exists today. In the early 1960s *Sjors* had become a comic magazine mainly for boys, and with *Tina* the other gender could now also be reached more effectively. Most of its comics were imported from the UK and from Spain, but there were also contributions from Dutch artists, again with an important share from (former) Toonder studios artists.

At the time of the merger, *Sjors* had 230,000 readers, but *Pep* only had 142,000 subscribers (Johannes and Cohen de Lara, 2005, p. 32). This was reason for DGP to call in the assistance of Peter Middeldorp, who became the main editor for all comic magazines of DGP in 1964. Within DGP this was the first time that the comic magazines had their own editor. Before that, this work was done by people who also worked for the other (adult) magazines. This meant that comics had now become part of the structure of VNU (be it that it was a small department).

The main task for Middeldorp was to change *Pep* into a more successful magazine that really could compete with *Sjors*. Middeldorp was hired, because he was experienced in the area of comics. His first paid job was in Brussels in 1957, as an editor of *Robbedoes*, the Dutch language version of *Spirou*, the influential comic magazine published by Dupuis. Middeldorp got the job in Brussels because the editor responsible for the Dutch edition wanted to have a native Dutch speaker for the Dutch edition of *Spirou*, meant for the Flemish and Dutch market. In Brussels Middeldorp soon became main editor of the Dutch *Robbedoes*, his counterpart being Yvan Delporte, main editor of the French version *Spirou*. He witnessed all new developments in Belgian comics, and saw the introduction of the French magazine *Pilote* in 1959, with Rene Goscinny as one of its founding fathers and main editors. Goscinny created *Asterix*, together with Albert Uderzo. This became *Pilote*'s most popular comic, and was already present in its first issue.

*Pilote* became a competitor for *Spirou* and *Tintin* magazine, because of the high quality of its comics, but also because of its more challenging nature: it did not carry out a catholic message, which to some extent was still the case in the Belgian magazines, and it was meant for adolescents, not for young children. Moreover it originated from France, not from Belgium (although many of the contributing artists to *Pilote* had published in the Belgian magazines before), and this alone made it attractive for the French audience.

After his arrival at DGP, Middeldorp changed the formula of *Pep* drastically, and used ideas from *Spirou* and *Pilote*. He added editorial pages, just like *Spirou* / *Robbedoes* and *Pilote* had, removed *Mickey Mouse* and introduced new comics from *Spirou* and *Pilote*, among which were *Asterix* and *Lucky Luke*. These comics would soon become two of the most popular comics in Europe, and certainly also in The Netherlands. Just as in the case of *Pilote*, adolescents became *Pep*'s main audience.

In the course of the 1960s Peter Middeldorp gave young Dutch comics artists the opportunity to publish in *Pep*. Some of them had their roots in the Toonder studios (e.g. Hans Kresse and Dick Matena), but for others (like Martin Lodewijk) *Pep* became their first opportunity to publish for a large audience.

In the period that Middeldorp had edited *Pep*, its circulation rose to 180,000. His successor continued the policy of editorials with a mix of the best French, Belgian and Dutch comics available at that time. The magazine got an extension of 16 pages, and now also included American comic strips and gags, like *the Peanuts*.



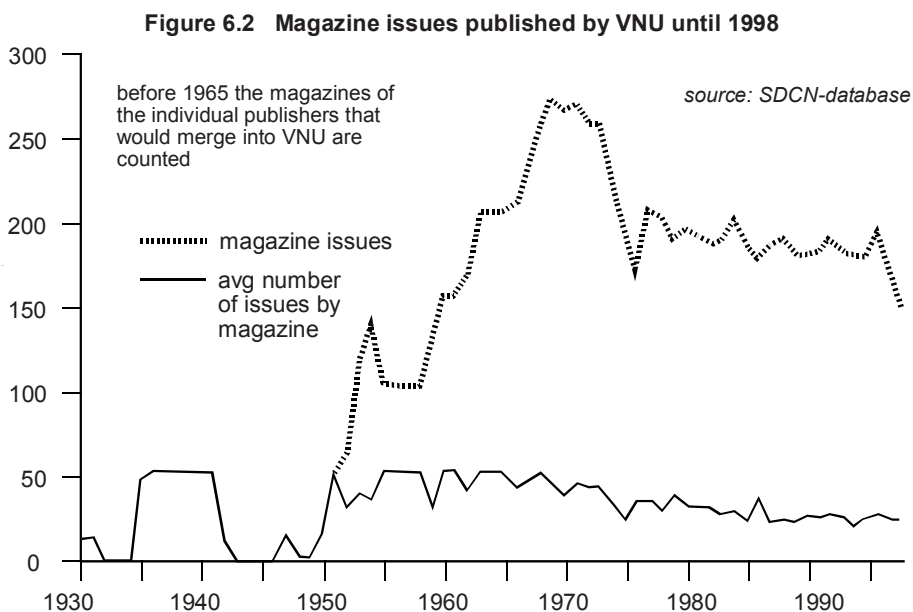
Among comics experts, *Pep* in the period 1965-1975 is known as the best Dutch comic magazine of its period (Kousemaker and Kousemaker, 1979, p. 191). Nevertheless, just like *Sjors* it started to lose subscribers in the 1970s, a general tendency of comic magazines.

In his next job, as editor for DS, DGP's partner within VNU, but also its strongest competitor, Middeldorp was asked to help with changing the position of *Sjors*, so that it could compete better with *Pep*. Ironically Middeldorp, the man behind *Pep*'s success, now stood on the 'opposite' side. This is not his own perception: he entered DGP almost at the moment of the merger, so he considers himself to be 'the first real VNU-man' (interview Middeldorp, 2009). At that time the comics in *Sjors* were mainly from the UK and from The Netherlands. Middeldorp assisted *Sjors*' main editor Frans Buissink, removed some of the English comics, and introduced comics from *Spirou/Robbedoes*, with which he was well acquainted from his Dupuis period, and that had a more modern look than most of the English comics.

This new formula helped to further strengthen *Sjors*' position, but the general downwards tendency of all magazines in the 1970s could not be avoided. This led to the merger of *Sjors* with *Pep* in 1975 into *Eppo*. In the long end this also did not help very much, because both magazines only partially had an overlap between their readers: in general the readers of *Pep* were older. The new magazine *Eppo* was too childish for a part of its readers, and too complex for another part: these readers withdrew their subscriptions.

*Pep* was more French oriented, and *Sjors* more Belgian and English oriented. *Pep* also offered more space for young Dutch artists. This was maintained in *Eppo*. *Eppo* became an international mixture of Dutch, Belgian, French, and to a lesser degree English and American comics. Under other names, including that of *Sjors & Sjimmie Maandblad*, the magazine continued to exist until 1999. When *Eppo* started, its circulation was 210,000 copies (Van den Boom, 1978, p. 12). Almost twenty years the circulation counted no more than 38,500 copies (*Handboek van de Nederlandse Pers en Publiciteit*, 1994, p. 415), and in the years after that this number became even smaller. In 1999 it was decided that the losses had become too big. After a history of almost seventy years (if one starts counting with the first *Sjors* annex in 1930) the magazine ceased to exist.

The history of these magazines shows how specialized comic magazines in The Netherlands had a life cycle that started in the 1930s, had its peak in the 1950s and 1960s, and went downwards from the 1970s. *Donald Duck* and (on a smaller scale) *Tina* are the only exception to that rule. Figure 6.2 shows the total numbers of comic magazine issues (N.B. not their circulation!) published annually by VNU. These include all VNU magazine titles. One of the reasons for the decline in the 1970s shown in the graph is the merger between *Pep* and *Sjors* into *Eppo*. Not only the circulation of the magazines decreased after 1970, but also the total number of issues and their average frequency of appearance.



### 6.3.3.2 Albums

Peter Middeldorp also made another contribution to Dutch comics: he took advantage of the idea to publish albums derived from the magazines more systematically than had been done before, something he had learnt in Belgium from Dupuis. Middeldorp, while working for DGP, introduced the first Dutch language versions of *Asterix*, and the first DGP albums of *Lucky Luke* (other Dutch language albums of this popular western comic had already been published by Dupuis). His bosses at DGP had not given their approval for the album editions, not being used to the con-

cept of a comic album. However, their opinion changed when these albums became enormous bestsellers, just as had been the case in other countries. Gradually the phenomenon of the comic album became accepted. The original resistance within DGP against albums can be explained by the fact that comic albums were more like books than like magazines, and at VNU one was mainly used to magazines and their distribution.

The distribution system of DGP and DS was equipped for large scale diffusion of magazines. It was based on thousands of individual retail-dealers (in Dutch: 'wederverkopers'), who went door to door every week along millions of Dutch houses with custom-built cars loaded with magazines, in order to deliver them to subscribers, and to sell additional articles, like the albums. But for these additional articles a seller's mentality was needed. Not every retailer was equipped with that property. Moreover, the customers also had to become accustomed to these products. When this was the case the unique 'wederverkoper'-system was an enormous advantage for the sales of albums. This only lasted for a few years, for already in the middle of the 1970s the retailers disappeared. Their role was taken over by a less personal, but more efficient distribution system: the VNU owned Aldipress distribution organization. Because of the enormous amount of VNU magazines that had to be distributed this immediately became the largest distributor in The Netherlands. Aldipress sold the VNU publications in large quantities to kiosks and other selling points for magazines and books. Thus a part of vertically integrated system could be maintained (production and distribution by the same company). But the final part of the chain, the selling to the customer, was boarded to stores. Thus the contact with the individual customer was lost.

Before Middelburg became active only a small part of the comic albums published by VNU were of Dutch origin. Just a few Dutch artists would have been able to create comics that could compete with the quality of the French and Belgian comics. Most of these artists belonged to the Toonder Studios, but these mainly concentrated on newspaper comics, and even more so after the failure of *Tom Poes Weekblad* (the short-lived attempt by Toonder and his colleagues to publish a comic magazine under their own flag, just before *Donald Duck* was introduced).

DGP's longest living series was *Donald Duck en Andere Verhalen* (by Disney artists). Frans Piët was one of the few Dutch comics artists not belonging to the Toonder studios of whom albums were published. His *Sjors* and *Sjors & Sjimmie* albums (*Sjors* was joined by *Sjimmie* since 1951) were DS' most popular comic

album series. From the other Dutch artists who worked for *Sjors*, no albums were published. Piët's *Sjors and Sjimmie* series were also the only Dutch DS albums that were translated: into French<sup>1</sup> and German.

In 1972, following an advice of McKinsey, all the VNU youth magazines moved to the new enterprise Oberon, a separate BV within VNU. The editors at Oberon had to collaborate more closely, but also had a lot of freedom to develop their magazines. At the same time that Oberon started, another imprint was introduced: Amsterdam Boek. VNU intended to publish all their books, including comic albums, under this imprint. This meant that the comics branch Oberon lost a source of income.

Oberon was well aware of this, because in 1973 a research was performed by Marktonderzoek Reeskamp (1973) on behalf of Oberon, into the market size of comics publications in The Netherlands. The market for comic albums in 1972 was estimated for 3.5 million copies, of which 30% was sold by Amsterdam Boek (Marktonderzoek Reeskamp, 1973, p. 9). Especially the *Asterix* albums contributed to this. Amsterdam Boek was on second position in the Dutch album market, immediately after Standaard, with a share of 35%, mainly due to sales of *Suske & Wiske* albums. On third and fourth position were Helmond (15%, with their Dutch market versions of the Lombard albums, originally prepublished in *Tintin/Kuifje* magazine) and Dupuis (10%; with the Dutch versions of the albums prepublished in *Spirou/Robbedoes* magazine). Other publishers had shares of 5% and less. From these figures it can be derived that it was profitable for Oberon to acquire the Amsterdam Boek comic albums.

It was awkward that the comic magazines were published by Oberon, and the albums that were derived from these magazines were published under the responsibility of another publisher. The Oberon managers did not accept this and after internal arousals they succeeded in 1976 to get the comic albums back from Amsterdam Boek.

In the middle of the 1970s, at the time of the merger between *Pep* and *Sjors*, new employees entered Oberon. A sign of the times was the fact that an artist became

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<sup>1</sup> As *Jojo et Jimmy*, seventeen albums from 1954 to 1971 were published by the Wallonian publisher Société d'Éditions Périodiques (sources: *Sjors en Sjimmie*, *Catawiki*, *Bedetheque*).

one of the two main editors of *Eppo*. This was Martin Lodewijk, who by now was one of the best known Dutch comics artists, because of his success with the *Pep* comic *Agent 327*. New functions were also created for marketing, licensing and merchandising, and for editing the albums.

In spite of the attention for Dutch comics artists at Oberon, many of these artists thought that the commercial character of VNU limited them in their artistic ambitions. Some of these artists had been working for the Toonder studios (like Thé Tjong-Khing and Patty Klein). They and other young creators started their own, independent comic magazine for adults called *De Vrije Balloen* in 1975. In this magazine they published their own adult comics, not constrained by commercial considerations.

They were inspired by the initiatives of French artists from *Pilote*, like Gotlib, Alexis, Moebius, Mandryka and Bretecher, who in the early and middle 1970s had started their own magazines *L'Echo des Savanes*, *Métal Hurlant* and *Fluide Glacial*, and publishing companies Les Humanoïdes Associés and Audie. This had the same background: they could not publish more adult oriented comics in *Pilote*, and felt constrained by that. They were more aware of their own creativity than older generations of comics artists. Influenced by the events in May 1968 and the underground culture from the United States, they were also looking for their own publication channels. As publishers did not offer them this opportunity, they created it themselves. In the case of the French former *Pilote* artists, this led to the departure of these artists from the magazine.

The Dutch artists did not dare to take that risk and their work for *De Vrije Balloen* had no effect on their work for Oberon. There were even friendly connections between editors of VNU and *De Vrije Balloen*. The name of the magazine was invented by Oberon and former Spaarnestad editor Frans Buissink (Lambiek.net). For the administrative part the artists contacted economics student and *Stripschrift* editor Hans van den Boom, who after a few years left *De Vrije Balloen* for an editor function at Oberon. Even a few years later he started his own, specialized comics publishing company Arboris that became successful in the 1980s and 1990s with many album series.

Van den Boom was not the only one of the VNU editors who used his experience with comics to start his own company. Marketing man Rob Harren left Oberon for Lombard (and later Média Participations), but also started on his own as comics

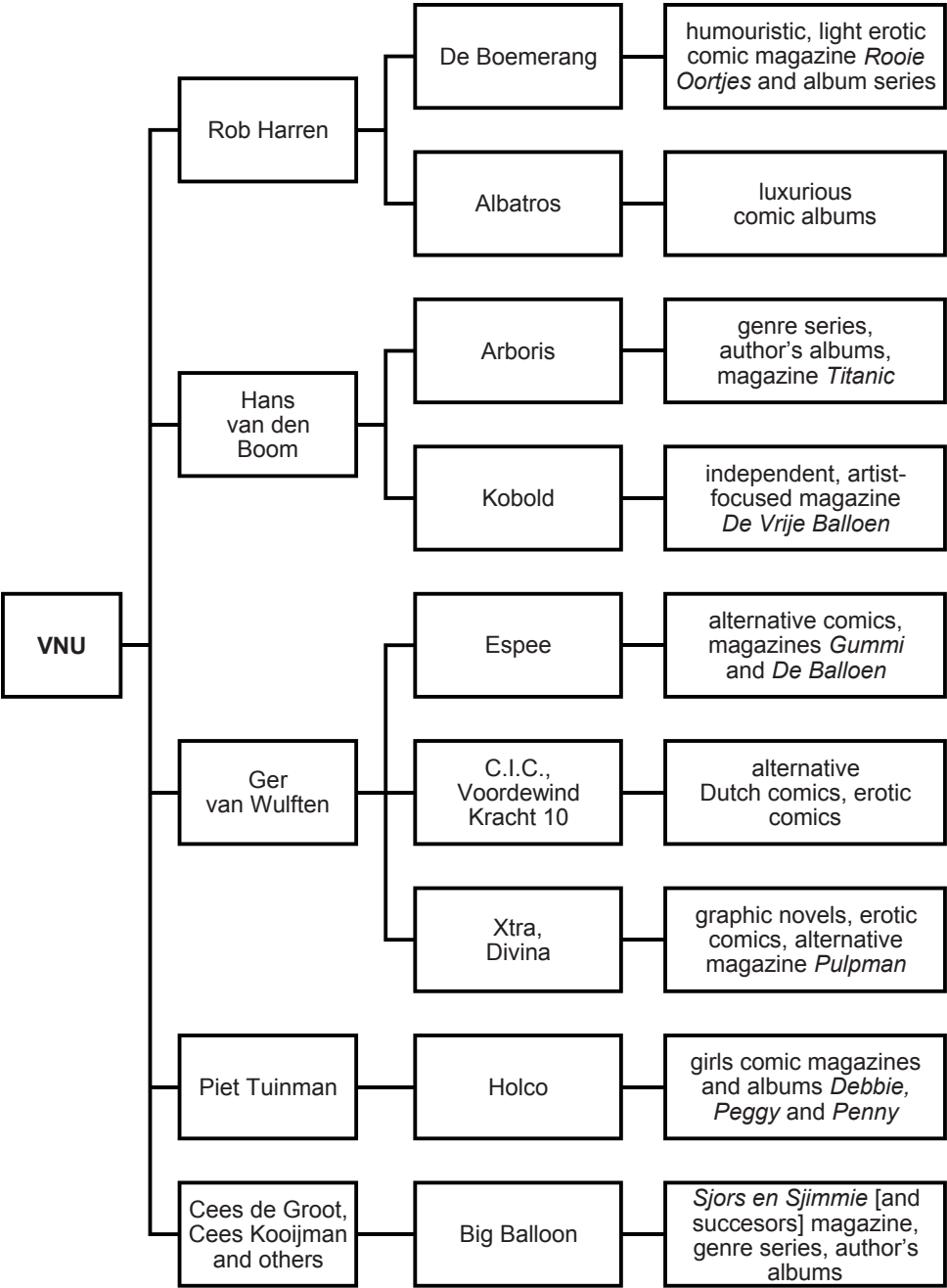
publisher with De Boemerang. Former DS manager Piet Tuinman, who had been involved in *Tina* magazine, started the publishing company Holco, where he used his experience in the market for girls' comics.

Finally, *Pep* and *Eppo* designer Ger van Wulften started Espee (an abbreviation of Small Press). Espee was a special case. Van Wulften was asked by the Oberon manager to experiment with publishing innovative comics, at the end of the 1970s. This would result in the innovative *Gummi*, the first Dutch comic magazine that featured international and Dutch comics for adults. *Gummi* was in many ways the adult successor of *Pep*. Van Wulften even got money from VNU to start his company, but although he became important for the development of adult comics in The Netherlands, his company remained too small for the demands of VNU. In the 1980s Van Wulften acquired *De Vrije Balloen*, and renamed it in *De Balloen*. At that time, the Oberon and Toonder comics artists who published in this magazine, had already been replaced by a younger generation of Dutch comics artists, among whom were De Jager and Stevenhagen, De Kort, Schreurs, and Windig and De Jong. Figure 6.3 gives an overview of the most important publishers that can be considered direct and indirect spin-offs from VNU (the list would be longer if other comics related companies and artist-owned companies had been included).

It became Oberon's policy to not only publish albums of the most popular series in the magazines, but also of most other series. Oberon also wanted to establish a series of albums by Dutch artists, which could then be licensed to other countries. In this way, Oberon would be less dependent on licenses bought from foreign publishers, and have more means to compete with other publishers who were active on the Dutch market, like Standaard (mainly with *Suske & Wiske*), Dupuis and Lombard.

A second pillar in Oberon's strategy with regard to albums was the joint venture with the French publisher Dargaud, the original publisher of *Asterix* and *Lucky Luke*. Amsterdam Boek only published these two, the most popular series by Dargaud. The other series had been licensed by Dargaud to the Dutch-Swedish publisher Semic Press. Rob Harren, the marketing manager of Oberon, negotiated with George Dargaud in Paris, and succeeded in licensing all titles from Dargaud that could be attractive for the Dutch market. The advantage for Dargaud was that all their albums were now licensed by the same company in The Netherlands, which also happened to be the largest magazine publisher in this country, with its own, large distribution organization. Since then many Dargaud series were pub-

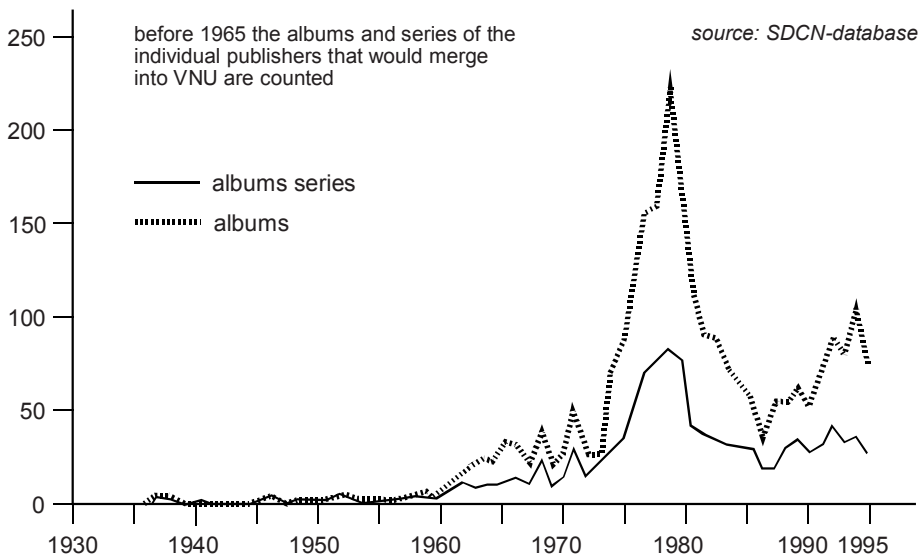
Figure 6.3 Spin-off of comics publishers from former VNU editors and managers, with a description of their comic production



lished by Oberon. Most of them had originally been pre-published in *Pilote*, and were already known in The Netherlands, because they had also appeared earlier in *Pep* and *Eppo*.

According to all the Oberon people I interviewed, this period formed a short Golden Age for comics in The Netherlands: the magazines (*Donald Duck*, *Tina* and *Eppo*) were still successful, although *Eppo*'s circulation was not comparable with that of its predecessors of the 1960s, and almost all VNU albums sold very well.

**Figure 6.4** Comic albums and series published by VNU until 1998



During the second half of the 1970s and the first years of the 1980s the numbers of albums and series that were published, increased annually (see Figure 6.4). Figure 6.4 shows that after the early 1980s these numbers decreased again until 1990, due to overproduction and dropping of sales

In general comic albums sold well in The Netherlands in the same period, as becomes apparent from CBS figures about comic albums sales (see Table 6.2). As can be derived from the table, the best period was in the years 1978-1981. After



**Table 6.2** Comic albums sold in The Netherlands. Overview of all official data that are available

year	sales of comic albums in copies (x mln)	turnover of comic albums in Dutch guilders (x mln)	total sales of trade books in copies (x mln)	share of comic album sales in total sales of trade books, in copies
1976	0.1	0.8	34.5	0.3%
1977	0.6	2.3	34.3	1.7%
1978	5.6	12.4	32.8	17.1%
1979	5	14.6	32.9	15.2%
1980	5.4	18.1	33.0	16.4%
1981	5.6	18.7	34.1	16.4%
1982	4.5	15.6	35	12.9%
1983	3.6	8.5	31.9	11.3%
1983	2.9	11.4	31.5	9.2%
1985	2.2	9.3	30.3	7.3%
1986	1.7	7.4	29.6	5.7%
1987	2.2	8.3	27.8	7.9%
<i>No official data about sales of comic albums in the period 1988-2005</i>				
	in euro's			
2006	0.7	3.9	43	1.6%
2007	0.9	5.3	45	2.2%
2008	1.3	6.5	47.7	2.7%

Sources: CBS Productiestatistieken Uitgeverijen (sales of comic albums 1976-1987), Stichting Speurwerk betreffende het Boek Speurwerk Boeken Omnibus (sales of trade books 1976-1987); GfK Retail and Technology (sales of comic albums and trade books 2006 -2008; sales of comic albums have been extrapolated from original data).<sup>1</sup>

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<sup>1</sup> Probably the CBS-figures in the years 1976 and 1977 are not complete: it is unlikely that the rise from 1977 to 1978 has been that enormous in reality (from 0.6

that the album sales started to decline again. This development is confirmed by the decreasing number of albums published, as can be seen in Figure 6.4.<sup>1</sup>

After this period of prosperity, decline started. This had several reasons.

Firstly in 1983 the Dargaud albums disappeared from the VNU publishing list. Dargaud had started a subsidiary in Brussels, Dargaud Benelux, for the Dutch and Belgian markets. Before that the Dargaud albums were distributed in Belgium by Lombard, with whom Dargaud had a long lasting cooperation. This had already been started in the 1940s when Dargaud published *Tintin* magazine for the French market, and was extended in the 1950s with the production of the Lombard albums for the French market. When, starting in 1961, Dargaud also became active on the album market (with albums prepublished in *Pilote*), Lombard returned this collaboration with Belgian editions of the Dargaud albums (in French).

However, because of an argument Lombard and Dargaud stopped cooperating in the 1980s. Dargaud's best alternative was to start his own firm in Belgium, with its headquarters in Brussels. He now no longer needed a joint venture with a Dutch publisher. Via Rob Harren Dargaud found a new distribution deal with Betapress, the second largest distributor of magazines after Aldipress, and its biggest competitor. Harren assisted Dargaud in these processes, because he had just left Oberon after a quarrel. George Dargaud had become a good business acquaintance and trusted him. The consequence of Dargaud's new internationalization strategy was

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million to 5.6 million albums sold in just one year, together with a rise in market share in the total sales of books from 1.7% to 17%). The research by Marktonderzoek Reeskamp (1973) on behalf of Oberon that was mentioned before in the text, confirms this suspicion: their estimation is that already in 1972 the sales of comic albums amount to 3.5 million copies (a share of 8.9% in the total sales of books). The figures of the early 1980s are confirmed by Rob Harren (interview Harren 2009), who estimated that on average 4 million albums were sold annually at that time. The figures of 2006-2008 are certainly incomplete: they do not include the sales in comics shops.

<sup>1</sup> It is not certain whether this tendency continued after 1987, because since that year comic albums were no longer a separate category in the CBS statistics, just as had been the case in the years before 1976. The development in numbers of albums and series produced suggests that from 1990 on there was space for more new albums and series again in the comics market, but it is not clear at all whether this is reflected in an increase of sales. Only in 2006 comic albums would become a separate category again in book sales statistics.

that the Dargaud-Oberon albums, which were the best sold Oberon albums, from then on were published by Dargaud Benelux, without the interference of Oberon, and therefore no longer a source of income for VNU.

Secondly, in the 1980s the comics market became more fragmented than before. There was no longer one, large target group of young children and adolescents, but in addition there were now also smaller segments of adults, with different preferences. Many of these adults were the same people who as children had been raised with the comic magazines and newspaper comics from the decades before, and who still liked the medium. Some of them collected new editions of classic comics for reasons of nostalgia, but others were more interested in innovative comics for adults. Competition became more fierce, by new album series from the Belgian competitors Lombard, Dupuis and Casterman, and by new, small 'de novo' publishers, who were specialized in comic albums for adults.

Thirdly the subscriptions to *Eppo* and its successors continued to dwindle. Albums started to compete with the magazines: there was an enormous supply of titles, and many people preferred to read a complete story in one time, instead of waiting every week for a new two page-installment in one of the magazines. In addition children had more alternatives (and more money) for their leisure time. There were more television channels, and computer games started to become popular. Since the 1990s computer games and the internet would become even more serious competitors for comics.

Finally, the original intention of Oberon and Big Balloon to build a publishing list of Dutch comics that could be sold to other countries, did succeed only partially. Most successful was the Dutch studio for *Donald Duck*, already founded in the 1970s. The Dutch Disney artists gained fame internationally. Their stories are still published in many foreign Disney publications. Probably the Dutch Disney comics are the most successful Dutch comics abroad.

Some comics originally produced for *Eppo* were also translated, like those of Don Lawrence. His albums, among which was the *Storm* series created for the VNU magazines, were translated into French and other languages. But although Lawrence was more popular in The Netherlands than in his home country, he was a British artist. The former Toonder artist and regular *Pep*, *Eppo* and *Donald Duck* contributor Dick Matena (probably the most versatile Dutch comics artist) was one of the few Dutch artists who became well known internationally in the niche of

adult comics in the 1980s: his comics were published in the American trend-setting adult fantasy magazine *Heavy Metal*, and his albums were translated for a.o. the American, French and Spanish market.

Most other Dutch comics had less success abroad. The most comic-friendly countries France and Belgium had their own, enormous supply of artists, and had no need for new, unknown Dutch comics. Other countries could also choose from the rich Francophone comics production.

These developments led to the decision of VNU management to separate the comics department from VNU, with the exception of the two bestselling comic magazines: *Donald Duck* (and the other Disney publications), and the comic magazine *Tina* for girls. Comics became a limited source of income and too large a risk for the large multinational that VNU had become. At the end of the 1980s almost 11.000 people worked for VNU, and they published fifty general magazines. The magazines had a total circulation of several millions of copies every week.

In 1990 Big Balloon was started, a comics specialist publisher, in which VNU still had a share of 52%. Most people from Oberon moved to Big Balloon. Big Balloon continued publishing the *Sjors en Sjimmie Magazine* and releasing albums pre-published in that magazine, as far as the rights on these series could be obtained. But now the position of magazines and albums had changed: “At VNU comics were embedded in a magazine publisher. The magazines were the core product and the albums no more than a spin-off. At Big Balloon this is just the other way around”<sup>1</sup> (Big Balloon manager Cees de Groot quoted by Dohmen, 1998, p. 17).

Big Balloon created opportunities for the young generation of Dutch comics artists that had started their comic careers in the 1980s in comics produced by smaller de novo publishers (artists like De Jager and Stevenhagen, De Kort, Windig and de Jong). They hoped that in the end this would result in well selling albums.

Oberon had already started publishing author’s albums that did not fit in *Eppo*, because they thought there would be a market for these not pre-published albums, and this policy was extended by Big Balloon. The albums were licensed from

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<sup>1</sup> Bij VNU waren de strips ingebed in een tijdschriftenuitgeverij. Het ging om de stripbladen, en de albums waren niet meer dan spin-offs. Bij Big Balloon is dat omgekeerd.

American, British and French publishers. Among the French publishers was Dargaud again: Dargaud Benelux did not want to publish all their albums for the Dutch market under their own logo, but only the less risky ones.

Big Balloon also licensed album series from the innovative, independent French comics publishers Les Humanoïdes Associés with whom they had a joint venture (to be more precise: the joint venture was with the Humanoïdes' imprint Alpen), and from Glénat. These albums were especially meant for the comics shops. Table 6.3 compares the proportions of the countries of origin of the album publications of VNU (including Oberon) in the period 1937-1998, with those of Big Balloon in the period 1990-1998.

**Table 6.3 Countries of origin of VNU and Big Balloon albums**

country of origin of albums	VNU 1937-1998 N = 2,305	Big Balloon 1990-1998 N = 500
originally Dutch	28.8 %	50.0%
unknown, diverse countries	33.0%	1.8%
French	12.4%	10.4%
American	15.0%	13.4%
UK	8.1%	17.6%
Wallonian	1.3%	3.8%
other countries	1.4%	3.0%
<b>total</b>	<b>100%</b>	<b>100%</b>

*source: SDCN database*

The table shows that the supply of originally Dutch albums is bigger at Big Balloon than at VNU. The share of albums in the category 'unknown / diverse countries' is much smaller at Big Balloon. This can be explained by the high number of Disney albums in this category. After the introduction of Big Balloon the Disney albums remained at VNU. In these albums the names of the individual creators are not mentioned, but it is known that they are created in a number of countries, like the USA, France, Italy, Denmark and The Netherlands. Also the share of English albums is higher at Big Balloon. In both cases the share of Wallonian albums is

low: these albums were imported in The Netherlands by Dupuis and Casterman, for a number of years via their subsidiary in The Netherlands. Lombard, the third large Wallonian comics publisher, licensed its albums for the Dutch market to (in chronological order) Van der Hout, Helmond and Albracht.

In the 1990s the number of selling points for comic albums decreased. This was caused by a smaller number of album bestsellers. Only bestselling albums were of interest for kiosks and general bookstores. The number of album titles produced increased, but the market for comics became smaller and more fragmented. Kiosks had no room for a continuous supply of large numbers of album series that only sold a few copies a week. A new distribution channel had developed that became specialized in comic albums: the comics shops.

The first comics shop/antiquariat in The Netherlands had already opened its doors in 1968 (the still existing Lambiek shop in Amsterdam), and gradually every town in The Netherlands and Flanders got their own comics shops. The number of shops especially started to rise since the end of the 1970s. In the same time these comics shops also became an important new distribution channel in France, the United States, the UK and other western countries. Many of them combined second hand comics with new titles.

In The Netherlands most of them had an almost complete supply of all comic albums that were available in the Dutch language market, from large as well as from small, independent publishers. Albums were mainly produced in series, and in order to attract new customers for a series, the shops should always have the whole series in stock, and not only the newest volumes. This specialization in comic albums, together with a supply of derived products (imported comics, magazines, posters, statues of cartoon characters, trading cards) became their reason of existence. At the end of the 1990s the comics shops had their peak in The Netherlands (see Table 6.4). Since 2000 a number of them have closed their doors again, partly because of a lack of successors, partly because of a diminishing market.

Although there were approximately hundred comics shops at the end of the 20<sup>th</sup> century, this number stood in no relation to the earlier selling points: six thousand kiosks and warehouses (Cees de Groot quoted by Dohmen, 1999, p. 35) sold comic albums during the short 'Golden Age' in the late 1970s, and many of these were lost for the majority of the comics publishers.

**Table 6.4 Comics shops in The Netherlands and Flanders**

year	The Netherlands	Flanders	total number
1985	76	23	99
1990	73	43	116
1995	105	59	164
2000	99	51	150
2005	93	58	151

The numbers include specialized comics shops as well as kiosks with a large supply of comic albums and magazines.

*sources: 1985: Van den Boom and De Raaf (1986);*  
*1990: Daalder (1991);*  
*1995: Schifferstein et al. (1996);*  
*2000: Schifferstein et al. (2000);*  
*2005: De Weijer (2005).*

### 6.3.4 Shifts in logics and value regimes

When comics gradually got a more prominent place within VNU, this was reflected by the time that editors could spend on them. In the 1960s Middeldorp was the first editor working for DGP who could spend all of his time to comic magazines and albums. Although comic albums were already produced by DGP and DS since the 1930s, they were a marginal phenomenon until the 1970s. At DGP it was especially Middeldorp who took the albums more seriously, but he was confronted with distrust of VNU managers and distributors. They were used to magazines, not to albums.

Because of their success on the market, there was more room for albums at Oberon, in the 1970s. Now for the first time there were specialized album editors. Because of the decreasing numbers of subscriptions to magazines, the albums were also seen as a necessary substitute. By means of the albums, the investments in Dutch comics in the magazines could earn their money back. The contract with Dargaud to produce albums for the Dutch market was also very important for Oberon's turn-over. After the disappearance of the 'wederverkopers', Aldipress took over the

distribution, but had more difficulty in selling the albums than with the magazines. This became even more serious after the disappearance of the biggest bestsellers in the 1980s. Kiosks and bookshops were not interested in selling titles that did not sell very well. A new diffusion channel came into life: the comics shops. These were perfect for the albums of specialist comics publishers, but their scale was too small for large publishers. Scope became more important than scale.

Since the 1980s Oberon and especially Big Balloon partly focused on the comics shops market. They translated albums that had not been pre-published in Dutch magazines, licensed from Dargaud, Humanoïdes Associés and Glénat. Among these were author's albums, the most art-like form of comics at that time, in which the name of the artist was more important than the name of the series or the main characters. One of the series in which they were published even got the name *Auteursreeks* (author's series). Author's albums were the European version (or precursors) of the present day graphic novels. As a consequence of its ambitions, the *Auteursreeks* was only popular with a limited audience. Comics had reached maturity, just like their readers, but especially these more mature comics were a product for a niche-market instead of a mass medium.

The value regimes of the editors involved in producing comics at VNU showed a development from purely market to a mixture of market and inspired logics. Many editors who entered Oberon and later Big Balloon were raised with comics, and were fond of them, in contrast with the generation before them. Of course the Oberon-editors also were well aware of the wishes of readers, but this was often combined with a genuine interest in comics and their creators.

Middeldorp still was typically a man with a keen eye on formulas for magazines that were attractive for specific target groups. He was not so much interested in comics themselves. On my question about his knowledge of comics before he started working at Dupuis he answered: "I had read everything that I could get a hold on, but had never read a comic before. I knew that Dick Bos was a comic book, and I did have a look at it once when I was a seven year old boy, but it didn't appeal to me, not at all"<sup>1</sup> (interview with Peter Middeldorp, 2009). And in another interview: "I realized that one cannot stay one's whole life at those comic

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<sup>1</sup> "Ik had me altijd suf gelezen, maar ik had nog nooit een strip gelezen. Ik wist dat Dick Bos bestond, dat had ik als jongetje van zeven wel eens ingekeken, maar daar vond ik helemaal niets aan. Dat zei me helemaal niets".



magazines. Moreover comics were not something that had my specific attention, I was no comics fan”<sup>1</sup> (Van den Boom, 1977, p. 19). Middeldorp united a sharp insight into marketing and magazines with specific knowledge of comic magazines and albums, and the latter he learnt at Dupuis.

At Oberon this knowledge was spread among more editors. Marketing manager Rob Harren combined knowledge of marketing with that of how the comics world functioned, but when he started his own publishing company De Boemerang he was also well aware of the necessity to operate efficiently, if you want to survive in a country with only marginal interest for comics, like The Netherlands. He combines market and industrial logics with an inspired value regime.

Van den Boom also shows this combination of value regimes, but is certainly more a comic lover than Harren, as appears from this quote:

*When I was a teenager I discovered ‘Pep’ and ‘Kuifje’ [‘Tintin’ - RdV]. I liked adventure comics. That evolved into a real hobby: reading comics and collecting them (...). In 1965 and 1966 the first Dutch ‘Asterix’ translations appeared. That was very special. The stories had already been published in ‘Pep’, but before that ‘Pep’ had not published album version of their stories. The magazine retail dealer who came at your door to deliver those albums, that was astounding, something very special. You had to be part of that (...). I became a comics fan and got involved in ‘Stripschrift’ (...). That’s more or less the story of how I entered the comics world. After that there was ‘De Vrije Balloen’ (...). Via ‘Stripschrift’ I got at a position at VNU, at Oberon. That was something I had hoped for, because to me it seemed great to have a job in the comics world.*<sup>2</sup>

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<sup>1</sup> “Ik zag ook wel in dat je niet je hele leven lang in die stripbladen kan blijven hangen. Bovendien waren strips niet iets wat mijn specifieke voorkeur had; ik was geen stripfanaat”.

<sup>2</sup> “In mijn tienertijd ontdekte ik Pep en Kuifje, avonturenstrips vond ik leuk. Van daaruit groeide dat tot een echte hobby: strips lezen en verzamelen (...). In 1965 en 1966 kwamen de eerste Asterix-en in het Nederlands uit en dat was wel bijzonder. De verhalen hadden al in de Pep gestaan, maar die deden daarvoor geen albums. De bladenman die die albums aan kwam dragen, dat was heel schokkend, heel mooi. Daar moest je bij zijn. (...) Ik werd stripliefhebber en raakte betrokken bij Stripschrift. (...) Zo

(Interview with Van den Boom 2009)

At Oberon Van den Boom became magazine-manager of *Eppo*. Later he started his own publishing company Arboris (Latin for ‘van de boom’), which was one of the most productive Dutch album publishers in the 1990s and early 2000s. At Arboris the tasks between him and sales manager Herman Jonas were divided especially with regard to the choices for the publishing list. In an interview Jonas says about this task division: “Hans is primarily a comics fan, whereas I guard myself not to become a fan. I read as few comics as possible, because I do not want to develop any personal preferences”<sup>1</sup> (Nieuwenhuis, 1998, p. 40). In another interview with Van den Boom his passion for comics also shows through:

*Van den Boom will probably not get very rich from Arboris. It is questionable whether he thinks that is a disaster. Twenty years ago he became involved in the comic information magazine ‘Stripschrift’ as a voluntary editor. Even now his enthusiasm shows through when he tells about the new Arboris-comic album ‘Sporloos’ [‘Without a Trace’ - RdV]. “That comic is fantastic. The story has a high pace and is extremely exciting. When I hear from the comics shops that they appreciate ‘Sporloos’ and that it also sells well, I am a happy man. I liked it myself and then it appears that others also value it highly”.*<sup>2</sup>

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kwam ik zo’n beetje in de stripwereld terecht. Daarna kwam De Vrije Balloen. (...) Via Stripschrift ben ik bij VNU terecht gekomen, bij Oberon. Dat was wel een beetje waar ik op hoopte, want het leek me heel leuk om een baan in de stripwereld te krijgen”.

<sup>1</sup> “Hans is in de eerste plaats een stripliefhebber, terwijl ik er zorgvuldig voor waak om een stripliefhebber te worden. Ik lees zo min mogelijk stripverhalen, zodat ik er ook geen persoonlijke voorkeur op na ga houden”.

<sup>2</sup> “Echt rijk zal Van den Boom waarschijnlijk nooit worden van Arboris. Of hij dat erg vindt, is de vraag. Twintig jaar geleden was hij als vrijwilliger betrokken bij het stripinformatieblad Stripschrift. Nog steeds klinkt het enthousiasme uit die tijd door wanneer hij vertelt over de nieuwe Arboris-strip Sporloos. ‘Die strip vind ik ontzettend goed. Het verhaal heeft vaart en is berespannend. Als ik van winkeliers hoor dat ze Sporloos kunnen waarderen en dat hij bovendien goed loopt, ben ik een gelukkig mens. Dan heb ik mijn eigen lol gehad en blijkt dat anderen er ook nog plezier aan beleven”.

(Dohmen, 1998, p. 15)

Van den Boom carries out are a mixture of inspired and market values, but his passion for comics is so strong that it has the ‘singular’ character that Heinich reserves for traditional arts. According to Heinich the singularity of art manifests itself in a lifelong dedication to an art form or to an artist, and can also lead to the choice to structure one’s working life around that art. This is certainly the case in the life of Van den Boom.

Comparable values are carried out by other former editors of Oberon. Thom Roep, long time main editor of *Donald Duck*, started as editor at Oberon in the early 1970s: “Since I was five years old, I’ve been busy with comics; collecting them”<sup>1</sup> (interview with Thom Roep, 2009). In another interview he says:

*To be totally honest, I don’t like magazines at all. I like comics. Some people think it’s strange that I read comics in the weekend and that I watch Disney movies. But it’s not my job, it’s my hobby, and that’s a big difference.*<sup>2</sup>

(Van der Nol, 2002, p. 10)

And finally Meerten Welleman, one of the album editors at Oberon:

*From my childhood I was devoted to comics, and at secondary school I discovered ‘Stripschrift’. I found out that one could not only read comics, but also read about them. That aspect fascinated me. Then at some moment I got involved in ‘Stripprofiel’*  
*[Stripprofiel en Stripschrift are both magazines for comics fans - RdV].*<sup>3</sup>

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<sup>1</sup> “Ik ben vanaf mijn vijfde met strips bezig en aan het verzamelen geweest”.

<sup>2</sup> “Ik hou, heel eerlijk gezegd, helemaal niet van tijdschriften. Ik hou van strips. Sommige mensen vinden het vreemd dat ik in het weekend stripboeken lees en naar Disney-films kijk. Maar het is niet mijn werk, het is mijn hobby, en dat is een belangrijk verschil.”

<sup>3</sup> “Ik ben van kinds af aan stripliefhebber geweest, en in mijn middelbare schoolperiode ontdekte ik *Stripschrift*. Toen kwam ik er dus achter dat je niet alleen strips kon lezen, maar dat je ook over strips kunt lezen. Dat aspect fascineerde me. Toen

(Interview with Meerten Welleman 2009)

After his period at Oberon and Big Balloon, Welleman became involved in Het Stripschap, the organization for Dutch comics fans, of which he now is chairman.

These values were in strong contrast with the value regimes of the managers of VNU as a whole: their value regimes slowly changed from product to market and industrial logics: scale advantages and efficiency became more and more important; the magazines themselves were lost sight of. Just as was the case with the educational publishers in Thornton's (2004) research, VNU's stress was more and more on the market of companies to acquire or to merge with. Finally even VNU's core product (magazines) was sold.

Looking at different levels of the organization leads to different conclusions. The evolution of values at company level, in which money became more and more important, and where the core product was lost out of sight, went together with a contrasting development at department level. The ambition of VNU to operate more efficiently in the 1970s, based on an advice by McKinsey, had led to the founding of Oberon, and at Oberon editors of comics had more freedom than ever before. Even in such a large company as VNU, genuine interest for the product was still possible. This resulted in an enormous diversity in the supply of albums. The publishing list included commercial comics for a mass market, but also author's albums, the most ambitious comics of that period. Ironically the shift to industrial logics on VNU's corporate level had led to inspired logics on the level of Oberon and Big Balloon.

### 6.3.5 Exit

As was already mentioned earlier Big Balloon stopped with its comic magazine *SjoSji Magazine* in 1999, because the number of subscriptions had become too small. In the same period VNU, still the biggest shareholder of Big Balloon, had made clear that they had intentions to sell all their general audience magazines. The magazines market had become fragmented and unpredictable. VNU shifted their attention altogether to business information. They decided they would sell all their

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kwam ik op een gegeven moment bij *Stripprofiel* terecht.”

magazines for a general audience. In 2001 the Finnish magazine publisher Sanoma acquired all VNU magazines, including *Donald Duck* and *Tina*, for 1.25 billion Euros. Before this happened Big Balloon convinced VNU management that their chances of survival would be higher if they would become completely independent. VNU agreed to sell the shares to the employees of Big Balloon and in the same year it became independent.

Big Balloon had almost as many employees as when it still was part of VNU, whereas the market for comics only had become smaller. In the early 2000s there were even more competitors in the small niche of comic albums than there were ten years before. In 2005 Big Balloon stopped with their comic album series. Nowadays it mainly publishes licensed magazines and books for very young children, often based on tv-cartoon series.

Sanoma is as much a general publisher as VNU was, but unlike VNU its strategies have not extended to other directions: Sanoma still focuses on magazines and other media for a general audience. Therefore Sanoma is glad with *Donald Duck* and the other Disney magazines, and also with the girls comic magazine *Tina*, that still have high circulation numbers. In 2009 *Tina* had a circulation of 48,195 copies, and the four Disney magazines had a total circulation of weekly 416,435 copies (HOI, 2011). *Donald Duck* was by far the best sold Disney magazine, with 314,281 copies (HOI, 2011). In comparison with the Disney publications in the 1980s and 1990s, the production of albums, pockets and special issues around Disney characters has increased enormously. Disney magazines for smaller and narrower target groups than *Donald Duck* have been introduced (like the magazines *Donald Duck Extra*, with longer stories, *Donald Duck Junior*, for young children that have just learnt to read, and *Katrien*, for girls).

Together with the *Suske & Wiske* albums published by Standaard, the Disney magazines and albums are the only comics today that are available in almost every warehouse and kiosk in The Netherlands. In Flanders the only Sanoma albums that are sold well are those based on recent Disney movies. *Donald Duck* magazine and albums are not popular in Belgium. In The Netherlands *Suske & Wiske* is the only serious competitor of the Disney albums and pockets. In the area of comic magazines *Donald Duck* still has so many readers, that it has no serious competitor in The Netherlands.

Summarizing, the withdrawal of VNU from comics publishing had the following causes. Firstly, the production and distribution of books in general and of comic albums in particular had always remained ‘fremdkörper’ within the company. VNU had their roots in the publishing of magazines for a general audience, and this caused a lack of attention to the (more specialized) books and albums divisions, and an ineffective distribution of these products. Secondly, they had the disadvantage that some of their best sold comics, *Asterix* and *Lucky Luke*, were licensed to them by Dargaud. When in the 1980s this publisher had decided to publish comics under its own name in the Benelux, this meant less income from comic albums for VNU. Thirdly, there was a decrease in the subscriptions to the formerly popular comic magazines, which was related to the rise of the comic albums as a substitute, and to the development of other media. Finally, in the course of their existence a number of acquisitions had made VNU that large, that in the 1990s it had become too expensive for them to focus on smaller niches like comics. Big Balloon was the only remains of VNU in the world of comics publishing.

Although Big Balloon was specialized in comics from its birth, it inherited a part of the mentality of VNU, especially with regard to the size of the firm: although only a very small company in comparison with VNU as a whole, it was still too big for the Dutch comics market. It could not compete with the more flexible and even smaller other comics specialist publishers in The Netherlands, nor with the more powerful Franco-Belgian conglomerates. These competitors had the advantage that they owned the rights to internationally successful series. The biggest comics best-sellers of the former VNU were owned by Sanoma, so Big Balloon could not profit from that either. In the end Big Balloon could only survive by stopping with publishing comics altogether.

### 6.3.6 Conclusions

In spite of the commercial character of VNU, it played a very important role in the evolutions of comics in The Netherlands. Originally a magazine publisher, it also introduced comic albums in The Netherlands on a huge scale. Children, adolescents and adults got the chance to discover Dutch and international comics. Especially in the Oberon and Big Balloon period, young Dutch artists got many opportunities to publish their work. Innovations like author’s albums were also introduced by VNU imprints. These copied the formulas of Belgian and French publishers and

translated their albums. For their survival the VNU comics publishers have always remained dependent on foreign publishers, from whom they licensed comics. The evolution from magazine into album went accompanied with distribution problems for the album. Its' availability stayed limited more and more to comics shops and a modest number of kiosks and bookstores.

The spin-off of VNU- knowledge about the comic magazine and album market led to a variety of specialized, *de novo* comics publishers, who continued to supply the Dutch market with comics. Most of the descendents from VNU are very small, out of necessity. Some of them are commercial, but others have artistic ambitions.

The history of VNU shows that comics have not only become a mature, independent medium, but have also changed from a rather uniform mass market medium into a product for a fragmented market. Most of these fragments are small niches. In The Netherlands Sanoma, the successor of VNU, and the Flemish *Standaard* are the only large generalists, surrounded by many small specialists.

## 6.4 OOG & BLIK<sup>1</sup>

### 6.4.1 Introduction

Oog & Blik is a typical *de novo* comics publisher: a small organization, founded with the purpose to publish comic albums, and specialized in doing that. Hansje Joustra and artist/organizer Joost Swarte were the founders of Oog & Blik (from now on: O&B). From its foundation in 1992 until 2010 it has been one of the few innovative, independent Dutch comics publishers. In 2010 O&B lost its' independence, after a voluntary acquisition by the literary publisher De Bezige Bij. De Bezige Bij is one of the most prestigious Dutch literary publishers. The acquisition can be called symbolical for the growing acceptance of comics as a potentially literary (or in a broader sense: artistic) medium. Nevertheless, the giving up of their independence was the only way that O&B could survive, which also says something about the size of the Dutch market for adult comics during the last years.

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<sup>1</sup> Appendix IV contains a table with an overview of the evolutions at Oog & Blik

For the text below Joustra and Swarte were interviewed (already in 2006). Other information was collected from interviews in numerous magazines and books, as well as documentaries about Joost Swarte. The datacollection ends in 2010, the first year that O&B was a part of De Bezige Bij. The data concerning the numbers of published albums are partly derived from other sources than the *SDCN-database*, because that already ends in 1998. The O&B album publication list was checked by combining the catalogue of the Royal Library with information from two comics websites: Catawiki (2011; most complete website for Dutch language comics collectors) and SSZ (2011; most complete website with overviews of Dutch language albums published since 2005).

In comparison with the previous case VNU, O&B has a much shorter and less complex history. Therefore the section about the evolutions of comics and of the organization will be more concise than was the case for VNU. Joost Swarte played an important role in the evolution of comics, therefore much attention will be paid to his contributions.

#### 6.4.2 Entry

The entry of O&B in the world of comics took place at the day of its founding, in 1992. Of course entry and founding take place in the same year for all de novo comics publishers, because that is the reason why they were categorized as a de novo publisher. However, O&B did have a precursor. Already in 1984 distributing company Het Raadsel was founded by Joustra and Swarte. Originally Het Raadsel was called into life with the purpose to distribute the French book *Hors Série* by Joost Swarte in The Netherlands, and other books by its publisher Futuropolis. The idea to publish a complete Dutch version of this luxurious, large sized book with illustrations by Swarte was abandoned for a more efficient and less risky idea: to add an attachment to the original version with the Dutch translation of the French text, but with a smaller font, and with small versions of the illustrations that were the main body of the book.

By doing this Het Raadsel was already a publishing company since its first distribution project. In the years after 1984 Het Raadsel gradually extended its distribution business, especially after 1986, when the only other distributor of independent and underground comics Drukwerk stopped its activities. Het Raadsel filled that



vacuum, and became the main importer and distributor of small and independent comics (both Dutch and foreign), that were sold in the comics shopss. Apart from distributing, Het Raadsel also published a few albums every year, among which were the books by Joost Swarte.

Since its beginning Het Raadsel collaborated with literary publisher De Harmonie, partly to distribute their books more effectively, and partly because both publishers shared an appreciation for comics and cartoons created by independent spirits. Het Raadsel would distribute the cartoon and comic books published by De Harmonie among comics shopss, whereas De Harmonie would distribute Swarte's books in book shops, via the Centraal Boekhuis, the largest book distributor in The Netherlands.

Jaco Groot, founder and owner of De Harmonie was well acquainted with Swarte, and had already published a book by him before Het Raadsel came into existence. Groot is a cartoon and comics fan (he was even co-founder and name-giver of the Dutch comics fan association Het Stripschap), and published comics and cartoon compilations, next to literary and other books, since De Harmonie's founding in 1972. De Harmonie was one of the first Dutch literary publishers who systematically published books with cartoons and comics.

In 1991 the small comics publisher Gezellig & Leuk, had asked Joustra to take over their publications, among which were the popular *Heinz* albums by Windig and de Jong. Joustra accepted, and this caused an increase in the Het Raadsel publications (see Figure 6.5a). Het Raadsel suddenly became as much a publisher as a distributor, and in fact also a competitor of De Harmonie. Joustra and Swarte decided that the distribution and publishing activities would be split into two independent companies, and this decision led to the founding of O&B. The agreement with De Harmonie would continue. Both parties could decide for each publication whether it would be a joint venture, or a publication by just one of them. The advantage of their collaboration, a good distribution in regular book stores as well as comics shops, would remain the same.

The first album publications under the new name O&B (see Figure 6.5b) were presented during the new comics festival *Stripdagen Haarlem*, a festival that was also initiated by Swarte and that had its first edition in 1992. Among them were books by Robert Crumb, Theo van den Boogaard and Windig and De Jong. These titles were exemplary for the policy of the new publisher. Crumb was already

known worldwide as the most influential underground comics artist, and was also one of the few comics artists around whose work exhibitions had been organized in art museums. Van den Boogaard was, together with Swarte, one of the founding fathers of underground comics in The Netherlands, and had always kept a sense of independence in his work, just like Swarte. Windig and De Jong were known throughout the country by their newspaper comic *Heinz*, and had started their career as independent, self-publishing artists with the same slightly anarchistic attitude that characterized Swarte and Van den Boogaard (Crumb's work is clearly more than 'slightly' anarchistic).

The books were launched in the context of exhibitions around the artists, which generated publicity for the artists and their publisher. Swarte had convinced cultural organizations in Haarlem to participate in the festival, like Teylers Museum (the oldest museum in The Netherlands) where the Crumb exhibition took place. This involvement of other organizations contributed to the status of the festival, but also to that of the artists that were exposed, and indirectly to the image of the publisher: from the beginning O&B manifested itself as a publisher for artistic comics.

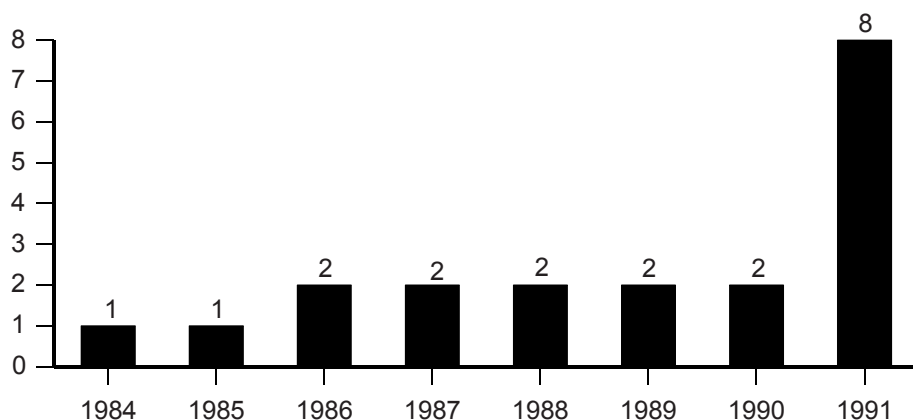
### **6.4.3 Joost Swarte, O&B and the evolutions of comics**

#### ***6.4.3.1 Joost Swarte's roles***

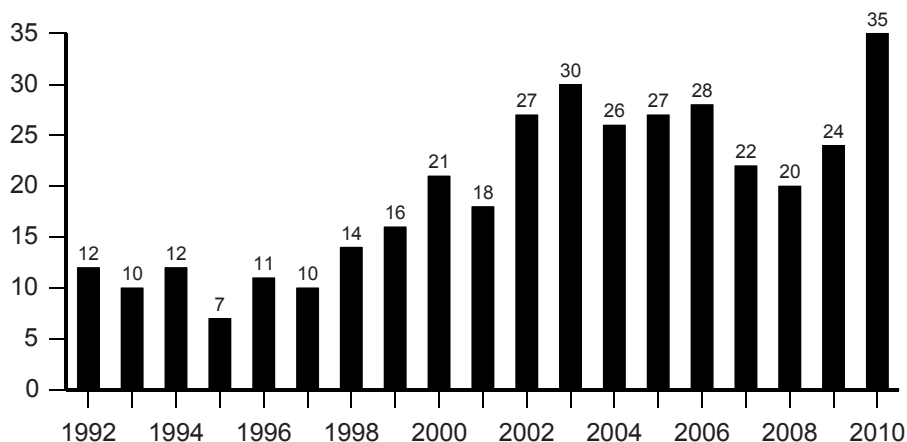
Although Joost Swarte became less active in O&B after a few years, because he wanted to focus on his creative work again, his involvement would remain important for the image of the publisher. Of course his own books were also published by O&B, mostly as co-productions with De Harmonie. Swarte's career exemplifies the evolutions that comics made through since the 1970s. His own books are a manifestation of those developments, just like the O&B publications. Joost Swarte linked national and international independent comics artists and publishers, and played an active role in giving comics and their creators more status and recognition. The overview of his activities that follows below will throw more light on this.

Swarte started publishing comics in 1970. At that time he studied at the Academy of Industrial design in Eindhoven, but felt more attracted to drawing and gave up

**Figure 6.5a Albums published by Het Raadsel (1984-1991)**



**Figure 6.5b Albums published by Oog & Blik (1992-2010)**



*sources: SDCN-database (1984-1998),  
catalogue Royal Library (whole  
period), Catawiki (whole period), SSZ  
(2005-2010).*

the countings include co-productions. In 2009 most albums were published in cooperation with De Bezige Bij. In 2010 O&B was acquired by De Bezige Bij

his studies. In 1971 he started his own underground<sup>1</sup> magazine *Modern Papier* ('Modern Paper'). He also drew in another underground magazine, called *Tante Leny presenteert* ('Aunt Leny presents'). Both magazines were among the first European underground publications. In 1972, after ten issues, *Modern Papier* merged with *Tante Leny presenteert*. More than creators of independent comics in other European countries, the Dutch artists had links with the underground movement in the USA, with whom stories were exchanged for publication. Because of this, Swarte and his *Tante Leny* colleagues were seen in the USA as main representatives of the European version of underground comics.

In 1973 Joost Swarte compiled the comic album *Cocktail Komix*, for the book publisher Tango, with work of Dutch and Belgian underground artists. This was the first and only album in which these artists appeared together. Swarte, because of his initiative, immediately got the position of spokesperson or leader of the Dutch underground comics. Among the artists in *Cocktail Komix* was Willem, the other Dutch comics artist and cartoonist that is probably better known in France than in The Netherlands.

Swarte had developed a drawing style that was influenced by Hergé. In 1977 he was one of the organizers of an exhibition in Rotterdam dedicated to *Tintin*. A part of the exhibition was dedicated to colleagues and followers of Hergé. Swarte himself was one of them. He invented the label 'klare lijn' ('clear line') to describe the characteristics of Hergé's style, and used this label as the title of one of the four catalogues for the exhibition. Quite quickly this term, and the French equivalent 'ligne claire', were accepted as the label for this typical European style of drawing comics. Swarte's later popularity in France contributed to the diffusion of the term, and his coining of Hergé's style in turn made him even better known. This can be

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<sup>1</sup> 'Underground comics' in countries like the Netherlands has a completely different connotation than in the USA or other countries with stronger censorship measures. In the USA underground comics could only be sold under the counter, whereas in the Netherlands none of the underground publications was ever threatened seriously by censorship. The only exception is Willem (Bernard Holtrop, also mentioned in the text), who had been prosecuted for his cartoons drawn for Provo. He fled to France after the Provo movement was ended, and still lives there. He continued his career as a provocative cartoonist and illustrator, for many (comic) magazines and newspapers. His best known cartoons and comics were created for the famous/notorious satiric magazine *Hara-Kiri*, its successor *Charlie* and for the left wing newspaper *Libération*. In the Netherlands his books are published by De Harmonie.

explained by the enormous popularity of *Tintin* in France and Belgium. According to Screech (2005) *Tintin* contributed to the development of a cultural identity in post-war Belgium and France. A young generation of artists who were raised with the *Tintin*-books of Hergé had begun to draw in his style, and now they were put in the cultural tradition of the 'ligne claire'. Bruno Lecigne's book *Les héritiers d'Hergé* from 1983, that includes a chapter about Joost Swarte, was a further recognition of Swarte's innovation of the style of Hergé. Lecigne was one of the first more serious (academic) comics critics.

Although many artists who used the clear line-style worked individually, one could say that this label worked as a kind of group formation strategy, just like Swarte's compilation album of Dutch underground artists four years before. This new label was also important for comics critics like Bruno Lecigne: it provided them with a tool to analyze and explain developments in comics, and made it possible for them to gain recognition as a serious critic.

Willem, who already had been living and publishing in France at the time that Swarte had invited him to publish in *Cocktail Komix*, had introduced Swarte to the innovative comic magazine *Charlie*. His stories in this magazine were well received, and this success opened other doors for Joost Swarte in France. He published the French edition of his first comic album *Modern Art* for Les Humanoïdes Associés.

At that time he had already met Etienne Robial, co-owner of Futuropolis, who was also interested in Swarte's work. Robial went a step further than the Humanoids: he presented comics and drawings by comics artists in luxurious, carefully designed coffeetable books. The comics creators were given the status of artists. Robial, who was educated as a designer, just like Swarte, shared his interests with him. Futuropolis published a number of books by Swarte, but perhaps most important was the publication of *Hors Série*. This was a luxurious book with a collection of reproductions of his posters, record and magazine covers and silkscreens. It included a preface by a designer and an introduction by Bruno Lecigne. It is typical for Swarte that both the idea for the book and for the two introductory texts came from him. The book appears to be a catalogue of an imaginary exhibition. Lecigne's text explains Swarte's work and puts it in a tradition of art as well as comics. This was the book that led to the founding of Het Raadsel.

Swarte's work had developed into ironic abstractions of the traditional *Tintin*-like comics stories, which added a (post)modern dimension to it that appealed to many young people in the 1980s, and especially to a more intellectual audience. The fact that irony is one of the most important stylistic means and one of the returning motives of Swarte, made him the right artist on the right (post-modern) time. He continued experimenting with formats, supported and influenced by Robial and by other Futuropolis artists. This led to more books, silk screen prints, posters and portfolios. The prints and portfolios became a good source of income and inspired many artists after him. This was also one of the first times that a comics artist produced drawings as independent art works, and not as a part of a story in a magazine or an album. In France his status had become that of an avant-garde artist.

Swarte published and exhibited in more and more European countries as well as in America. Art Spiegelman, a former underground artist with more ambitions than his colleagues, invited him to publish in *Raw*. Spiegelman's own comic *Maus* was pre-published in *Raw* and got him a Pulitzer award in 1992 (the first Pulitzer for a comic book). Again, Swarte was part of an important innovation in the area of comics, for *Raw* was the first, luxurious, intellectual international comic magazine in the USA. It was filled with material by a new generation of comics artists from the USA and many European countries, and was distributed worldwide. Because it was in English, this magazine could reach a wider audience than the French publications.

In the 1990s Swarte was especially active as an organizer and emancipator of modern comics in The Netherlands. He founded the comics festival *Stripdagen Haarlem* that quickly became the most important comics festival in The Netherlands. His example was the yearly French comics festival in Angoulême, Europe's largest comics festival. Just like Haarlem, Angoulême is a relatively small town, where many institutions work together to make the yearly festival a success. Part of the festival is commercially oriented, but it also pays attention to new developments in 'les bandes dessinées'. *Stripdagen Haarlem* also pays much attention to innovative comics from around the world, and in this way distinguishes itself from the other Dutch comics festivals. The festival works together with many other cultural institutions, for practical reasons, but mainly to ensure that it becomes integrated in the cultural infrastructure of the city.

In France grants for comics publications, governmental support for educational programs for comics artists, and for festivals like the one in Angoulême had been

called into life in the 1980s, when Jack Lang was French Ministre of Culture (during the Mitterand age). In The Netherlands it took much longer before the art institutions were ready for comics. The possibility of art subsidies for comics artists had not come into the minds of the experts of the national art funds Fonds voor Beeldende Kunsten, Vormgeving en Bouwkunst (FBKVB) spontaneously. Joost Swarte spoke the language of art experts, and convinced the policy makers of the FBKVB that the exclusion of comics from subsidies could only be explained by a lack of knowledge about the artistic potential of comics. Since 1998 experimenting comics artists could get subsidies from the FBKVB, and in the first years of this new form of support for comics, Swarte was the main adviser.

Summarizing, Swarte played a crucial role in the evolutions of comics from the 1970s until the 1990s, in The Netherlands as well as internationally. He was part of an international network of artists and publishers who introduced new forms of comics, and he used his knowledge of developments in France to stimulate the legitimacy of comics as an artistic medium in The Netherlands. Swarte's en Joustra's publishing firm O&B was one of the platforms to present these innovative comics to the Dutch audience.

#### **6.4.3.2 *O&B's evolutions***

As Figure 6.5 already showed, O&B did not grow out into a publisher with a high production, although there was an increase in the title production since the end of the 1990s. They never published more than thirty albums in a year (except in 2010, when O&B had been acquired by De Bezige Bij). It would have been too risky to produce more, even for a small publishing company with a low overhead like O&B.

One of the ways to survive in the small niche of artistic comics was to share the risk with other publishers. De Harmonie was already mentioned. With them they published albums by Swarte himself and other Dutch artists, but also translations from albums by Crumb, Spiegelman and Tardi. To share the cost of printing of one of the Crumb albums, O&B worked together with the American alternative publisher Fantagraphics. The different language versions of the book could thus be printed in one printing session. O&B also worked together with Sherpa. Sherpa is another small publisher that was started in 1989 by comics enthusiasts Mat Schiff-

ferstein and Peter Kuipers. Schifferstein also translates comics for several publishers, including O&B, and he was one of the employees of Het Raadsel. Even more than O&B Sherpa concentrates on author's albums for which there is only a small market in The Netherlands. Together the publishers produced translations of the French artist Baudoin and the Italian artist Mattotti.

In the last years before the merger with De Bezige Bij O&B had stopped collaborating with De Harmonie. Distribution to bookstores via the Centraal Boekhuis had become affordable for O&B, by means of a cooperative organization for small publishers.

In their publication policy O&B varies titles that fit within their program, but also appeal to a larger audience, with titles of which it can be known beforehand that they will not turn out to be bestsellers. In other words: the often used strategy of internal subsidy. The most productive Dutch artists in the O&B stable are Windig and De Jong, the creators of *Heinz*. Their titles belong to the better selling albums on their list. Even more popular are the *Sigmund* albums by Peter de Wit, compilations of comic strips that appeared in de *Volkskrant*, co-produced with De Harmonie. O&B introduced many young Dutch comics artists to a broader audience, that before had only appeared in small press publications (among them are Peter van Dongen, Guido van Driel, Mark Hendriks, Maaike Hartjes, Marcel Ruijters and Wasco). Many of the O&B albums got recognition by comics critics in general newspapers and magazines, as well as in the fan magazines. This appreciation was also reflected by awards to O&B for best albums.

O& B started as a publisher of Dutch comics, who occasionally published a translated album. Until the middle of the 1990s the majority of the albums were still originally Dutch, but after that the number of translations, especially from French and American artists gradually increased. In the last few years the balance has shifted to translations: in 2009 and 2010 only a quarter of the albums was originally Dutch.

O&B published some of their books in English for the international market. These were albums by Robert Crumb and Chris Ware, but also by Dutch artists like Marcel Ruijters, Maurice Hoff, Hanco Kolk and Erik Kriek. Two volumes of Chris Ware's *ACME Novelty Date Books* (2003 and 2007) were published in cooperation with the Canadian alternative comics publisher Drawn and Quarterly. O&B was



also involved in a coedition with the French publisher L'An 2, concerning the anthology of illustrations and comics by the Belgian artist Ever Meulen.

The American O&B translations came from the best known American and Canadian alternative comics publishers Fantagraphics (Clowes, Crumb, and Schulz), Pantheon (Spiegelman, Ware), Drawn & Quarterly (Seth, Tomine, Sacco, and Ware) and Top Shelf (Thompson). The artists all belong to the top creators of alternative comics in the USA and Canada, with the exception of Charles Schulz, whose famous *Peanuts* comics can hardly be called alternative.

The original French and Belgian publishers of the translated O&B albums were especially Les Humanoïdes Associés (albums by Moebius, Bilal, Dupuy and Berberian, Yslaire and Boucq), to a lesser extent L'Association (Baudoin, Tardi, and again Dupuy and Berberian), Casterman (Loustal, Mattotti, Igort), Dargaud (Blain, Larcenet), and incidentally other French publishers like Seuil, Albin Michel, Cornelius, Desbois, Delcourt and Glénat.

Dargaud, Casterman and Glénat are mainstream comics publishers, but also successfully copied innovations introduced earlier by other, smaller French publishers, so it is not so strange that O&B translated their albums. However, if we look at the names of the authors, we see that some of them (Moebius, Bilal, Boucq) already had been introduced to the Dutch market by other, often more commercially oriented publishers, like Oberon, Big Balloon and Casterman.

It is surprising that there are no translations from Futuropolis albums, apart from the books by Swarte himself. This is remarkable, because Swarte was inspired by Robial's Futuropolis.

It is also striking that the translations from L'Association are limited to two authors that do not belong to the core of the L'Association group. L'Association is the most innovative French comics publisher of the 1990s. Their role can be compared with that of the Humanos and of Futuropolis in the two previous decades. The best known L'Association artists Lewis Trondheim, David B., Stanislas and J.C. Menu started their career in publications by Futuropolis. L'Association is one step further in the evolution of comics than its predecessors. Not only are their creators against an overruling commercialism (just like Robial was), they are also more autonomous, experimental, and more aware of the possibilities of comics and of the status of comics artists than their precursors.

J.C. Menu became controversial in the French comics and book world, because of his radical (but carefully designed) pamphlets in which he attacked the market values of the commercial comics publishers (see Menu 2005). Menu is not so much against establishment in general, like the generation of 1968, but especially in favor of more recognition for comics as an autonomous form of art. L'Association is the first comics publisher that has produced pamphlets like these. They are in many ways comparable to the manifests of the historical avant-garde art movements in the decades before World War Two.

O&B has especially contributed to the evolution of originally Dutch comics, by giving a young generation of artists the possibility to publish. It is a little more conservative with regard to its translated comics, most probably out of pragmatic reasons. Translations of Moebius and Bilal have been chosen by O&B for reasons of internal subsidizing: these are names that almost guarantee success. The market for luxurious coffee table books like the ones produced by Futuropolis is much smaller in The Netherlands than it is in France, and therefore O&B has limited itself to only a few of such editions. The more radical innovations like those introduced by the L'Association group are obviously one evolutionary step too far for O&B, but perhaps also for the Dutch comics world.

#### **6.4.4 (Shifts in) logics and values regimes**

It is clear that the value regimes of Joustra and Swarte are dominated by the domain of inspiration, of art, but that both men also use market related values, mainly as an instrument to reach artistic purposes. It is thanks to Swarte's strategic insight and ability to switch between roles as an artist (inspired value regime) and as an entrepreneur (market value regime) that innovative comics have become more institutionalized than they were before.

#### **6.4.5 'Exit' by acquisition**

The small size of the niche that O&B is operating in, eventually led to O&B's acquisition by De Bezige Bij. In this respect there is again a similarity with Futuropolis: when Robial's firm ran into financial problems in 1987, Futuropolis was ac-

quired by Gallimard, France's most prestigious literary publisher, with whom they had collaborated before.

The problems of O&B were partially caused by the downfall of Het Raadsel. Het Raadsel had continued with its distributing activities in comics shops after the foundation of O&B. In the course of the 1990s it even became quite large (with ten employees), especially since productive mainstream comics publishers like the Dutch Arboris and the Belgian and French Casterman and Glénat had become their customers. However, in the early 2000s Casterman and Glénat left Het Raadsel again, because their distribution company in Belgium La Caravelle extended its activities to The Netherlands. Together with the shrinking of the comics market this led to the collapse of Het Raadsel in 2004.

If O&B and Het Raadsel had not been two separate organizations, the first would also have become the victim of the bankruptcy of Het Raadsel. One of the former employees of Het Raadsel continued the distributing activities under the name Strips in Voorraad, but this was a one man company that worked on a much smaller scale than Het Raadsel did.

The turnover from O&B alone gradually became too low for Joustra to keep the publishing company running. In 2009 he started a joint venture with De Bezige Bij. Graphic novels became a hype among literary publishers after 2000 (a hype that had started in the USA), and many literary publishers had become active in that niche. De Bezige Bij was carefully looking for an entrance into the world of graphic novels, and O&B could possibly offer them that entrance. After a joint venture phase that lasted for a year this changed into a voluntary acquisition in 2010. O&B is now part of De Bezige Bij, but has kept its editorial independence. Its publishing activity is higher than ever before (see Figure 6.5, albums published in 2010). O&B profits from the strong presence of De Bezige Bij in book shops and from their marketing knowledge (and budgets). For De Bezige Bij the advantage is that they now own Netherlands's most prestigious comics publisher, with an enormous international network in the comics scene. Moreover, literary comics fit well into the portfolio of De Bezige Bij: since decades they are also the main publisher of the classical *Ollie B. Bommel* stories by Marten Toonder.

#### 6.4.6 Conclusions

Joost Swarte has been important for the evolution of comics in general, by giving them more recognition as a form of art. Evolutions of comics in the USA and especially France were introduced by O&B and Swarte in The Netherlands. Individuals like Swarte can cause changes in existing conventions, thanks to abilities to cross borders between different worlds: comics and autonomous, established art. Comics, especially in varying album formats, have become more institutionalized than before. The O&B books are examples of these innovative comics. O&B has especially contributed to the evolution of originally Dutch comics, by giving a young generation of artists the possibility to publish, and has also introduced foreign comics artists to the Dutch market.

### 6.5 DUPUIS<sup>1</sup>

#### 6.5.1 Introduction

Together with Casterman, Lombard and Dargaud, Dupuis is one of the best known and most productive French-Belgian comics publishers. Creators like Jijé, Franquin, Morris and Peyo, who all worked for Dupuis' comic magazine *Spirou* (Dutch version: *Robbedoes*) belong to the most influential European comics artists. Their popular comics for children have been translated into many languages, and are part of the European comic-canon. Among them are *Lucky Luke*, *the Smurfs*, *Spirou* himself, and *Gaston Lagaffe* (in Dutch: *Guust Flater*).

Many Dupuis series are well known in The Netherlands, because they were published and distributed either directly by Dupuis themselves in The Netherlands, or via the Dutch VNU comic magazines (especially in *Sjors* and *Eppo*, but also in *Donald Duck*). After Casterman, the publisher of the *Tintin* albums, Dupuis is chronologically the second Belgian publisher that after a start as a generalist developed more and more into a comics specialist. Just like Casterman and Lombard, Dupuis paved the way for European balloon comics.

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<sup>1</sup> Appendix V contains a table with an overview of the evolutions at Dupuis.

Dupuis was an independent family business until 1985. In that year the division of Dupuis that was responsible for the comic magazines and albums was acquired by Groupe Bruxelles Lambert (GBL; owned by the Belgian billionaire Albert Frère) and the French publisher Hachette. In the 1990s Hachette sold its Dupuis shares to GBL. In 2004 GBL sold Dupuis to Média Participations (MP) for 102 million euros (Bellefroid, 2008, p. 135). By this acquisition MP became Europe's largest comics publisher. MP has its headquarter in Paris, and also shelters Dargaud and Lombard. In 2010 the Dupuis division of MP had 78 employees and a turnover of almost forty three million euros (Orbis, 2011).

*Spirou* magazine still exists today, but the Dutch version *Robbedoes* stopped in 2005, after having appeared for 67 years (since 1938). Apart from the French *Spirou* magazine Dupuis publishes many album series, both for a young audience and for adults. It is also involved in animated movies, based on the comics.

The information for this section was gathered through a large variety of sources. In contrast to the scarcity of information about Dutch comics publishers, many books have been written about the Belgian comics publishers and their artists. Books that contained much information about the editorial policies of Dupuis, about the mergers and acquisitions and about the dynamics in the comics published were useful (Bellefroid, 2005; Bellefroid, 2008; Dayez, 1997; De Laet, 1985; *Stripjaar-boeken*, 1984-2007). In addition books with historical analyses of Belgian comics were used (De Laet and Varende, 1979; Derscheid and Pasamonik, 2009; Dierick and Lefèvre, 1996; Screech, 2005), a Master thesis about the editorial policy of Dupuis and Lombard in the 1980s (Lefèvre, 1986), a report about the economic position of Belgian publishers in 2008 (Challe and Dujardin, 2010), articles in magazines like *Stripschrift*, *Boekblad* and on the website *Actua BD*.

For the Dutch language side of the Dupuis affairs additional information was collected by means of my own interviews with Peter Middeldorp (editor of *Robbedoes* in the period 1957-1964) and with Erwin Cavens (also editor of *Robbedoes* and after that varying functions for the Dutch language department of Dupuis since the late 1970s, since 2008 for Ballon Media). For Dupuis' title production the next sources were used: for the Dutch titles the *SDCN-database*, Matla (1998), the online catalogue of the Koninklijke Bibliotheek, and the websites *De Stripspeciaal-Zaak*, *Catawiki* and *De Officieuze Strippagina*. For the French titles Béra, Denni and Mellot (1996; the French equivalent of Matla, 1998), the online catalogue of the Bibliothèque nationale de France, and the websites *BDoublées* (database of all

comics published in French language comic magazines) and *Bedetheque* (database of all French language comic albums). For the financial data the *Orbis* database was used (Orbis, 2011).

Although Dupuis has had Dutch language departments since the 1930s, it is a Wallonian, Francophone publisher. Its history and policy are mainly determined by the events in the French language headquarter. This is why this section especially pays attention to those evolutions. The consequences for the Dutch department and for the Dutch language publications will be taken into account in a separate Sub-section 6.5.5.

### 6.5.2 Entry

In 1898 Jean Dupuis founded a printing company in Marcinelle, a Wallonian village near Charleroi. Dupuis is a convinced catholic who among other commissions, prints parish newsletters and a parish magazine, both on behalf of the local canon. Inspired by these catholic publications, he extends his activities in 1922 by starting a publishing company. His aim is to publish books and periodicals that are attractive for a general audience, have a content that is less banal than those of other, more mundane publishers, and carries out catholic values. In the 1920s Dupuis launched illustrated magazines for women and for men, *Les Bonne Soirées* (later renamed to *Bonne Soirée*) and *Le Moustique*, which became successful. Dupuis started a subsidiary in Paris, so that his publications were also available in France. In the thirties Flemish versions of the magazines appeared. The Flemish version of *Le Moustique* was called *Humoradio*, and was later renamed into *Humo*. Both *Le Moustique* and *Humo* still appear today, but are now published by the originally Finnish mediaconglomerate Sanoma (who also acquired the VNU magazines: see Section 6.3 about VNU).

After the success of *Bonne Soirée* and *Le Moustique*, Dupuis wanted to start a magazine for children, with the same intentions as with the other magazines: it had to be less sensational than other, French language youth magazines that were filled with American comics. *Le Journal de Mickey*, the French comic magazine that introduced Disney and other American comics to a broad French audience in the 1930s, for Dupuis was an example of how his magazine should *not* become. *Le Petit Vingtième*, the annex to the Belgian catholic newspaper *Le Vingtième Siècle*

was a better example. *Le Petit Vingtième* was the magazine where *Tintin* had made its debut in 1929. Especially because of *Tintin* and other comics by Hergé the annex was an instant success, also across the French-Belgian border. The albums based on the *Tintin* series sold well in Belgium, France and Swiss. This had led to the acquisition of the *Tintin* album rights by Casterman in 1934. Casterman, being a more experienced book publisher than *Le Vingtième Siècle* (Casterman had already been founded in 1780) succeeded in making the *Tintin* albums even bigger bestsellers.

One of Jean Dupuis's sons, Charles, was commissioned to look for suitable comics and artists for the Dupuis youth magazine. He approached Hergé, but the latter preferred to stay loyal to *Le Petit Vingtième* (Dayez, 1997, p. 192). In 1938 the first issue of *Spirou*, as the magazine was called, was launched, with the young Charles (only nineteen years old) as its publisher. Charles Dupuis would remain responsible for almost fifty years as the publisher of *Spirou* magazine and of the comic albums, until his withdrawal in 1985, the year in which Dupuis was sold to Groupe Bruxelles Lambert and Hachette. After eight months, but still in 1938, the Dutch version of *Spirou*, *Robbedoes* was also introduced. One of Jean Dupuis son-in laws became responsible for the Dutch language branch of Dupuis, and had his own office in Antwerpen.<sup>1</sup> Before Dupuis started to publish comics, he already had a subsidiary in Paris, which made it possible to distribute *Spirou* in France. Already before the war *Spirou* was also available on the French market, which had a much larger potential than the Wallonian one, and a Dutch version was available in Flanders. There was a necessity for Dupuis to enter the French market: the Wallonian market alone was too small for a magazine with high printing costs like *Spirou*.

After 1951 there would also be Dutch subsidiaries (1951-1954 in Eindhoven; 1955-1970 in The Hague; and 1971-1991 in Sittard). The subsidiaries in The Netherlands and France were founded for diffusion and distribution purposes, and not so much for the production of *Spirou* magazine and the Dupuis albums: this was done at Dupuis' own printing division in Marcinelle.

*Spirou/Robbedoes* included a comic with the same name by the French artist Rob-Vel (artist name of Rob Velter). His comics were clearly influenced by Hergé. Apart from French and Belgian artists, the magazine contained classical American

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<sup>1</sup> In the 1950s this would be moved to Brussels, together with the editorial offices of Dupuis that were moved from Marcinelle.

comics (a.o. *Dick Tracy*, *Superman* and *Red Ryder*), but from the start Dupuis' intention was that *Spirou* should become independent of foreign supply as soon as possible. In contrast with *Le Petit Vingtième*, *Spirou* was not an annex but an independent comic magazine. Nevertheless there were strong editorial links between *Le Moustique* and *Spirou* from the start, and also between the editors of *Humo* and *Robbedoes*. Many comics artists that became well known for their comics in *Spirou* also drew illustrations for Dupuis' other magazines *Bonne Soirée* and *Le Moustique*.

In 1940 Dupuis published its first two comic albums, the first one by Gianolla, another artist influenced by Hergé, and the second one by Rob-Vel and Dineur. The latter album was partly based on the *Tif et Tondu* stories pre-published in *Spirou* magazine. Dutch versions of these albums appeared in respectively 1940 and 1942.

#### 6.5.2.1 Conclusion

Dupuis entered the comics market already before the Second World War with a magazine, as well as with (two) albums. The background of this entry is comparable to that of the Dutch VNU publishers: extension of the market with the new target group of children. A second similarity is that the VNU companies and Dupuis both published (and printed) illustrated magazines. A difference is that Dupuis is more explicitly catholic. Another difference is that *Sjors* appeared as an annex and would only become independent from other magazines after the war, whereas *Spirou* was independent from its beginning in 1938. Perhaps exemplary for the differences between the comics cultures of both countries is that the most important character from the first VNU comic magazine *Sjors* is based on an American comic, whereas the *Spirou* character is French-Belgian from the start. Its main source of inspiration is another Belgian comic: *Tintin*.<sup>1</sup>

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<sup>1</sup> There is a remarkable historical link between *Spirou* and *Sjors*, in the person of Martin Branner. The American comic character *Perry Winkle* upon which *Sjors* had been based was drawn by Branner. His comics were also well known in France: they were already published in a French magazine since 1923, a year after *Perry Winkle*'s debut in the United States (De Waal, 2008, p. 119). *Perry Winkle* albums had been translated into French since 1926 (source: Bédétheque; *Perry Winkle* became *Bicot* in French). In 1934 Rob Velter (Rob-Vel), at that time working on cruiseships, had met Branner in America. Branner taught Velter the principles of drawing comics. He even



### 6.5.3 Evolutions

#### 6.5.3.1 *The magazine*

Just before the start of the war a new artist was involved in the magazine: Jijé, the artist name of Joseph Gillain. Jijé has started his career in another Catholic magazine, with a comic that was strongly inspired by Hergé's *Tintin* (just like had been the case with Rob-Vel). In the first war years it became more difficult to get the American comics to Europe that had until then been published in the magazine. Jijé took over the role of the creators of *Superman* and *Red Ryder*, and made his own versions of these American comics. Because of the war it became more difficult for Rob-Vel to send his *Spirou* stories to Belgium from France. Dupuis bought the rights of the *Spirou* comic from Rob-Vel, and from then on Jijé would create his version of the title comic of *Spirou*. While doing this he developed his own style, in which the traces of Hergé gradually disappeared.

In 1941 and 1942 (in the first war years *Spirou* continued to appear) the catholic principles of Dupuis' *Spirou* became apparent in another comic drawn by Jijé: *Don Bosco*, and in a series called *Notre code d'honneur en action* ('Our code of honour in action') written by Jean Doisy (the first editor of *Spirou*) and illustrated by Jijé. *Don Bosco* glorifies the life of the famous Italian 19<sup>th</sup> century priest with the same name. In *Notre code d'honneur en action* the moral attitude of *Spirou* readers was more or less prescribed. The titles of the installments of this series speak for themselves:

1. *Un ami de Spirou est franc et droit;*
2. *Un ami de Spirou a du cran, il sait dire oui ou non;*
3. *Un ami de Spirou aime la discipline libre et joyeuse;*
4. *Un ami de Spirou est fidèle à Dieu et à son pays;*
5. *Un ami de Spirou est l'ami de tous, mais surtout des faibles;*
6. *Un ami de Spirou sait se rendre utile, se déranger pour les autres, se priver;*

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became Branner's assistant in the United States for two years (sources: *Bédétheque, Comicipedia*). After his return to France, Rob Velter discovered the popularity of Hergé's *Tintin* and copied his style when he got the opportunity to draw his own comics in a French magazine, before he was asked by Charles Dupuis to create a leading character for his new youth magazine *Spirou*.

7. *Un ami de Spirou n'a pas peur de se salir les mains, mais veut se garder propre dans ses pensées, ses paroles et ses actes...;*
8. *Un ami de Spirou est toujours gai et de bonne humeur même devant la difficulté...*<sup>1</sup>

(*Spirou*, No. 25 to 29, 1941; source: *BDOubliées*)

Later Dupuis published the *Don Bosco* stories as albums, but also a comic-biography about Jesus Christ, illustrated by Jijé. In 1948 *Spirou* published Jijé's biography in comics form of Baden Powell. The catholic scout movement had already been an example for Hergé, and this was repeated by *Spirou* artists. Comics about scouts would appear in *Spirou* for decades.

When the war was ended, the American supply also restarted. Jijé started other comics, together with *Spirou* editor Doisy. The magazine was that well known already, that it attracted young Wallonian artists who also wanted to give comics a try. There were not that many alternatives as a job for creative people who lived in Wallonia. The most talented ones were selected by Jijé and got schooled by him. Soon *Spirou* also became available again in France. There were separate editions of the magazine for the Belgian and for the French market.

In 1949 a law was introduced in France that had to protect the youth against publications like comics, that were considered sensationalist and harmful for children: 'La Loi du 16 juillet 1949 sur les publications destinées à la jeunesse' ('the Law of the 16<sup>th</sup> of July 1949 concerning publications meant for youth'). Quite unique was the fact that catholics and communists joined their forces to get the law through. Comparable actions had been undertaken by governments in many other western countries. In France the law did not only have a moral background, but was also meant to protect French artists against competitors from abroad. Especially American comics, very popular in France in the 1930s, became victim.

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<sup>1</sup> "A friend of *Spirou* is frank and righteous; he has guts, he knows when to say yes or no; he likes discipline freely and joyously; he is faithful to God and to his country; he is a friend of everybody, but especially of the weak; he knows how to make himself useful, to care for others, without self-interest; he is not afraid to make his hands dirty, but keeps his thoughts, words and deeds proper; he is always gay and good-humored, even in difficult times."

However, also French and Belgian comics were scrutinized for content that could be offensive to children. The Belgian publishers had the advantage that they all had a strong catholic background. After some experiences with censorship, their editors and artists became more careful and got used to self-censorship. The few American comics that still were in *Spirou* disappeared (the last ones stopped in 1952), and were replaced by original Belgian and French comics. The only American comic of whom Dupuis had published albums was *Red Ryder*, a western comic drawn by Harman. A new western comic appeared in *Spirou* since 1954: *Jerry Spring*, drawn by Jijé.<sup>1</sup> It can be considered as the follow-up on *Red Ryder*. Even the typical American phenomenon of the western had now been transformed into a Belgian comic. Jijé was by now was an allround comics artist, able to draw humouristic as well as realistic comics, in several genres, varying from religious biographies, humor, westerns and adventure.

The Belgian comics artists adapted themselves to the demands of their biggest market potential: France. This not only became apparent from self-censorship, to escape censorship or fines, but also in changing sceneries in the comics. A Belgian city became a French city. Franquin even changed the uniforms of Belgian cops into those of French gendarmes (Dierick and Lefèvre, 1996, p. 467). It was the ability to adapt to the French protectionist measure of the youth law that contributed to the success of Dupuis, Lombard and Casterman on the French market. The Belgians had been able to supply suitable comics for children, innocent magazines and albums with a healthy, educative content, fitting with the French culture and with a catholic undertone. They were quicker than most French comics publishers with these publications and therefore ahead of them, a position that would last until the 1970s.

In the 1940s and 1950s there were more comic periodicals in Belgium and France, but there was only one serious competitor for *Spirou*: *Tintin* magazine. *Tintin* magazine started in 1946, and was published by the new Belgian firm Lombard, founded in Brussels by Raymond Leblanc. Of course its major attraction was that

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<sup>1</sup> *Jerry Spring* was also the comic in which the French artist Jean Giraud would later make his debut in *Spirou*, as an assistant to Jijé. After that Giraud drew the most popular *realistic* European western comic *Blueberry* (the most popular *humoristic* European western comic is without a doubt *Lucky Luke*) for *Pilote*, clearly influenced by Jijé's *Jerry Spring*. In the 1970s Giraud was one of the innovators of French comics for an adult audience, mainly under his 'nom de plume' Moebius

of *Tintin* himself. For Hergé the magazine was an opportunity to clean his image. This had been fouled during the war, because of his contributions (*Tintin*, other comics, cartoons) to the nazi-confiscated journal *Le Soir*. Leblanc had been active in the resistance movement, and was the ideal man to legitimize Hergé again. Just like *Spirou*, *Tintin* magazine was distributed in Belgium and France, and also got a Dutch edition: *Kuifje*.

From the start of *Tintin* magazine there was a continuous competition between both magazines that contributed to the high level of their comics (Dayez, 1997). It stimulated the artists to develop the most out of their talents. The *Tintin*-artists were labeled as the ‘School of Brussels’, and the *Spirou* artists as the ‘School of Marcinelle’. Jijé was the informal founder of this ‘school’, and among his disciples were Morris, Franquin, Will, Peyo, Hubinson, Charlier, Paape, and later also Roba and Tillieux; the core artists of *Spirou*’s Golden Age.<sup>1</sup> Whereas the overall character of the comics from *Spirou*’s most important rival *Tintin* was quite serious, *Spirou* in general was more humouristic.

The drawings of Hergé and his followers were characterized by the ‘clear line’, a rather stylized way of drawing, whereas the *Spirou* artists drew in two styles:

1. realistically and detailed, or
2. very loose and cartoonlike.

The cartoon style was especially perfected by Franquin, originator of the so-called ‘Big Noses’-tradition in European comics. An important difference with the *Tintin*-artists was that the *Spirou*-crew really formed a unity: they worked together closely. Jijé shared his home and studio with Morris, Will and Franquin. For that reason these four *Spirou*-artists were later also referred to as the ‘gang of four’. At *Tintin* magazine there was a distinction between those artists that helped Hergé in his studio with the constant revisions of the earlier *Tintin* stories (artists like Jacobs, Martin and De Moor, who also got their own stories in *Tintin*), and the other artists who worked for that magazine.

At the end of the 1940s Jijé went to Mexico and the United States, to collect more material for his comics. He stayed there for three years, and was joined by his

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<sup>1</sup> The editorial offices of *Spirou* moved to Brussels in 1955 (only the printing division stayed in Marcinelle). Most of the artists mentioned above also came from the Brussels area, so the name ‘school of Marcinelle’ should not be taken literally.

friends and colleagues Morris and Franquin. They met the French artist Goscinny, the later creator of *Asterix* and co-founder of *Pilote*, who was working there at the time. In 1955, a few years after the return of Morris and Goscinny to Europe, Goscinny would start writing the scenarios for Morris' comic *Lucky Luke*. Since their cooperation started details from American history became an essential part of the *Lucky Luke* stories. Franquin had already taken over the role of Jijé: he drew the title comic *Spirou* since 1946, invented the fantasy-animal Marsupilami and taught other artists how to create comics in the typical *Spirou*-style (a.o. Roba and Jidéhem).

Morris' stay in the USA led to a detailed knowledge about the history of comics. This later resulted in his series *9ème art* that appeared from 1964 until 1967 in *Spirou*, and was dedicated to the American and European founders of modern comics in the early 20<sup>th</sup> century. It contained biographies of the artists, and included a page with examples of their comics. 'Ninth art' would become a label for comics often used by comics fans and scholars. Morris had introduced it, aware of his own position in the tradition of American, French and Belgian comics. The title of the series makes clear that comics could actually be seen as an art form, with a history of its own. For many *Spirou* and *Robbedoes* readers, this series was their introduction to the history of the medium.

The 1950s and 1960s were the Golden Age of *Spirou*: the magazine was read widely, the editorial formula of the magazine and the unity of the comics proved to be an enormous success. In the first half of the 1960s the version of *Spirou* for the French market had a circulation of 200,000 copies, and the Belgian version 85,000 copies (De Laet and Varende, 1979, p. 46). After the war Dupuis had started publishing albums according to a steady formula. The albums had a predetermined length, and were based on stories that had been pre-published in *Spirou*. The constraint with regard to the number of pages of the albums was born out of necessity: in the years after the war there was a scarcity of paper. This formula led to a recognizable image of Dupuis as a comic magazine and album publisher. The most popular comics were republished in album format, and these album series were reprinted over and over again.

The most successful album series have already been mentioned: *Lucky Luke*, *Spirou*, *Buck Danny*, *Gaston Lagaffe* (*Guust Flater* in Dutch), *Johan and Pirlouit* (*Johan en Pierewiet*) and the *Schtroumpfs* (*De Smurfen*). Yvan Delporte was the editor in chief during these years, the period 1956-1968 (De Laet and Varende,

1979, p. 40) and a stimulating force behind the successes of the magazine and the albums. Delporte also took the role of scenarist in many comics series, and worked closely together with the artists (a.o. Peyo and Franquin).

However at the end of the 1960s the glory period ended. Delporte and some of the most popular artists left *Spirou* at the same time. The most important one was Morris, who was asked by Goscinny to join him (together with their joint creation *Lucky Luke*) at *Pilote*, the magazine Goscinny had cofounded a decade earlier, and that in the meantime had become the main competitor for *Spirou* and *Tintin*. Dargaud, *Pilote*'s publisher could offer Morris better financial conditions than Dupuis. Dupuis kept the publishing rights for the thirty-one *Lucky Luke* albums that had been pre-published in *Spirou*, but all the new albums would be published by Dargaud. To make matters even more painful for Dupuis, the new *Lucky Luke* albums would be published in Belgium as a joint production with Dargaud's partner Lombard: the other competitor of Dupuis. Eddy Paape and Jijé also left *Spirou* to work for *Tintin* and *Pilote*. *Buck Danny* creators Victor Hubinon and the very productive scenarist Jean Michel Charlier had already worked for *Pilote* since it started, next to working for *Spirou*. Other artists of the first *Spirou* generation, like Franquin, gradually became less productive.

Many series in *Spirou* were still the same ones that appeared in the late 1950s. Although the sales of the albums that were produced were quite satisfactory, no active policy had been introduced to do more on that area.

Thierry Martens, the successor of Yvan Delporte, was *Spirou*'s main editor from 1969 to 1977. He got the task to look for a new generation of artists. He succeeded in doing this and even found a replacement for *Lucky Luke*: the humouristic military western *Tuniques Bleues* (*Blauwbloezen*), created by Salvérius (later replaced by Willy Lambil) and Raoul Cauvin. Cauvin soon became one of the most productive scenarists of *Spirou* in the 1970s and later decades. Martens also offered young artists a platform to publish comics in a new annex to *Spirou/Robbedoes*: *Carte Blanche* (*Vrijvel*). However: most of these artists merely copied the styles of their ancestors from *Spirou*'s Golden Age. In fact there was no real innovation. The editors at *Spirou* knew that the real innovations took place in France, but they were unable to adapt to these changes. *Pilote* had been one step ahead of them, because of its abilities to address a large audience of adolescents, and to attract young talented artists from France and Belgium as well.

At *Tintin* magazine one had to deal with the same competition from *Pilote*. Artist and scenarist Greg became editor (from 1965 to 1974). He had worked together with Franquin for *Spirou* already in the 1950s, but had also created comics for *Pilote* (*Achille Talon*, in Dutch *Olivier Blunder*). He used his experience to adapt *Tintin* to the demands of the time, by introducing comics by young artists that were not copies of the classic *Tintin* comics, and succeeded in rejuvenating the magazine better than Martens did at *Spirou*. But at the same time evolutions in France continued and took a more radical turn. In the middle of the 1970s many young *Pilote* artists left that magazine and started their own magazines and publishing companies, in order to create comics without constraints, comics that gave them the opportunity to express themselves as adults. These new publications proved to be an instant success; it seemed as if the audience had waited for them.

At *Spirou* the struggle with this development showed through in a continuous change of editorial policies. One tried to please new generations of children, but at the same time to publish comics that were meant to attract adolescents and adult readers. Of course such a combination in one magazine did not work out. One of the clearest manifestations of this transition period was an experiment introduced by Franquin and Delporte in 1977: a weekly attachment to *Spirou* called *Le Trombone Illustré*.

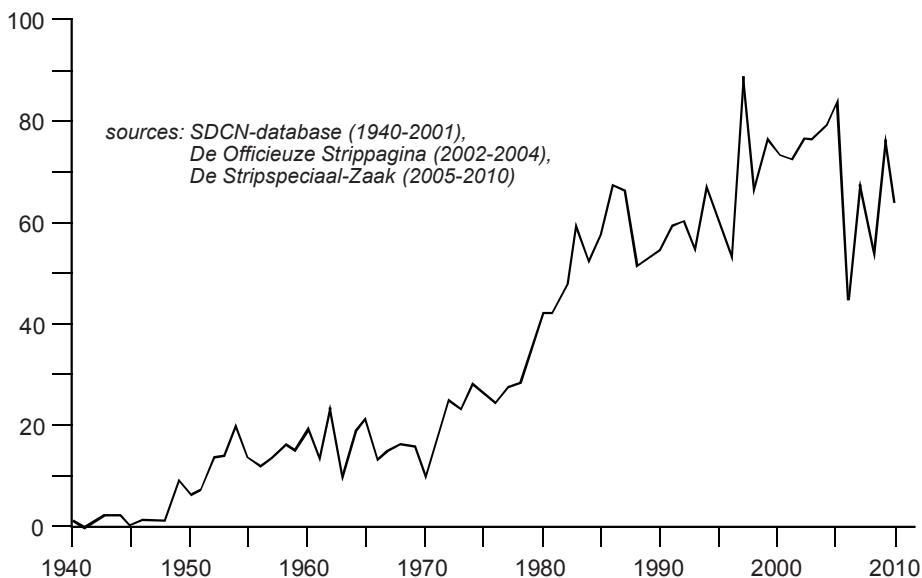
This annex contained slightly anarchistic comics that were mainly meant for an adult audience. Many young French and Belgian artists were involved in the publication. The cartoons mocked the conventions of the *Spirou* comics. The annex had no approval of Martens; he was simply passed by Charles Dupuis, who liked the work of Franquin so much, that he immediately agreed with the initiative. However, after thirty issues *Le Trombone Illustré* had to disappear again, due to growing protests of (parents of) readers, and probably also of editors. Charles Dupuis had interpreted Franquin en Delporte's magazine as a gift to the parents of the young readers of *Spirou* (Dayez, 1997, p. 127), but obviously this was not appreciated by the same parents. This could hardly be surprising, since the values carried out in the *Trombone* (those of independent artists, inspired by the protest generation of 1968) were the opposite of the traditional catholic values of *Spirou* itself.

In the years after 1977, new formulas were tested, although never as radical anymore as *Le Trombone Illustré*. Franquin had discovered a new direction for his comics, and now started publishing his cynical adult comic gags *Idées Noires* for *Fluide Glacial*. This comic magazine and its publisher Audie were founded by

Gotlib, one of the French artists who had left *Pilote* in search for more artistic freedom.

In spite of all the attempts to change, *Spirou* kept losing readers, just as was the case for most comic magazines for children in the 1970s. At the end of the 1970s the circulation of the French and Belgian versions of *Spirou* together was 162,000 copies, a difference of more than 100,000 copies with the middle of the 1960s (when the circulation still was 285,000 copies; De Laet and Varende, 1979, p. 46). In the middle of the 1980s this number was reduced again with almost 100,000 copies: in 1985 there were 72,000 copies (Lefèvre, 1986, p. 41). The losses of the magazine were compensated by the increasing importance of the albums.

**Figure 6.6 Dutch language album production of Dupuis (1940-2010)**



### 6.5.3.2 Albums

Starting in 1978 Thierry Martens led the new album division of Dupuis (he even got the nickname ‘Mr Album’ at Dupuis). He introduced new album series and is (co-)responsible for the growth of the album production in the period 1970-1985 (see Figure 6.6). In the past only the most popular *Spirou*-series were published as albums, now many other series, including those of the new *Spirou* artists, were



added. These albums would sell well, certainly in combination with the reprints of the older *Lucky Luke*, *Schtroumpfs*, *Spirou* and *Buck Danny* albums. Whereas in 1971 three million Dupuis albums were sold, in 1977 this number had risen to six million, and it even amounted to thirteen million in 1983 (De Laet, 1985, p. 32). After 1983 a crisis struck the French language comics market, partly caused by overproduction. In 1985, the year of the acquisition of the comics division by Albert Frère and Hachette, Dupuis still sold eleven million albums (Bellefroid, 2008, p. 11).

In the 1980s the role of the magazine had definitely changed. It was mainly kept alive to test comics for their suitability as an album series, and to promote them. The focus was now on the albums, and both editors and artists approached comics from these album logics (Lefèvre, 1986). However, the album policy of Dupuis still had an important constraint: Martens was allowed only to publish albums based on those series that had been pre-published in *Spirou* magazine. Because the magazine had kept its juvenile character, there were no attractive series for an older audience. In the French and Belgian comic albums market this adult audience had become more important. Comics shops were specialized into these albums. Apart from the classical *Spirou* series, only a few new Dupuis series fitted in the supply of these shops.

Whereas the Belgian comics publishers had stayed focused on children, the French publishers approached an older audience. Even before the *Pilote* artists had left Dargaud to publish their own magazines and albums, Dargaud had already started a series meant for an adult audience that predominantly contained one-shot albums (in one or two installments), with their collection *Histoires Fantastiques* (since 1972). A few years later the boom of smaller, independent French publishers started.

The first Belgian publisher who reacted on the French developments was Casterman. They were active on many areas as a publisher, but as far as comics were concerned, they were mainly known for the Hergé albums, until 1977. In that year, the same year that *Le Trombone Illustré* had caused upheaval among *Spirou* readers, Casterman started the new comic magazine (*A Suivre*).<sup>1</sup> In this magazine many young French and Belgian authors got the opportunity to pre-publish long install-

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<sup>1</sup> In 1980 a Dutch edition (*Wordt Vervolgd*) was started.

ments of their stories, which afterwards were published as albums. (*A Suivre*) had literary ambitions, as appears from the editorial in the first issue by editor Jean-Paul Mougin, founder of the magazine: ‘(*A Suivre*) will be the savage irruption of comics into literature’<sup>1</sup> (Pasamonik, 2011). Mougin’s ideas for the magazine were partly based on the long, literary comic stories by the Italian artist Hugo Pratt, who became famous with his series *Corto Maltese*. Mougin had already introduced Pratt’s work to Casterman a few years earlier, and this artist would remain one of the core creators for (*A Suivre*) (Pasamonik, 2011).

The first albums derived from the magazine appeared in 1979, in the collection *Les Romans (A Suivre)*. Comparable collections, also based on stories pre-published in (*A Suivre*), were *Un Auteur (A Suivre)* and *Studio (A Suivre)*. More than seventy albums would appear in these collections in the 1980s and 1990. Most of them were translated into Dutch by Casterman. The albums were often one-shots and no installments of series, just like Dargaud’s *Histoires Fantastiques*. The albums often counted much more pages than the traditional 48, and could even have the length of a literary novel or a novella.

Because of the important role of the artist and scenarist as creators, in comparison to that of the hero of the story, these albums were labeled as author’s comics or author’s albums, a term derived from the French auteur’s cinema. The length, the one-shot format and the stress on the creators implied that Casterman had broken with some of the most established formulas in mainstream comics. (*A Suivre*) was the first successful Belgian reaction on the French innovations from a large, established publisher. With the magazine and the albums they addressed the French market. It was the second innovation that Casterman introduced: they had also been the publisher of the *Tintin* albums since 1934, less than ten years after the introduction of balloon comics in Europe. *Le Petit Vingtième* had started with the *Tintin* albums, but Casterman had made Hergé’s creations available in many languages. Casterman had certainly changed in the decades since then, for it had always been a rather conservative publisher, with for a long time an even more explicit catholic image than Dupuis and Lombard.<sup>2</sup>

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<sup>1</sup> “(*A Suivre*) sera l’irruption sauvage de la bande dessinée dans la littérature”.

<sup>2</sup> E.g. in the 1930s, a period in which Casterman still published many religious books, they profiled themselves as ‘papal publisher’ in their letterheads (Peeters, 2003, p. 82).

Very soon after the launch of the new Casterman collections Dargaud reacted with the new collection of one shots *Portraits souvenirs* (since 1980), that had a more literary character than their *Histoires Fantastiques*. Now the second Belgian comics publisher also awoke: Lombard started a comparable series of one-shots called *Histoires et Légendes* (since 1981). Many titles of both series were translated into Dutch: the Lombard series by Lombard itself; the Dargaud albums by the joint venture between Oberon and Dargaud until 1983, and after that year by Dargaud Benelux and Big Balloon. The main difference between the Roman (*A Suivre*) and the other collections was the length of the Casterman albums. The competition between the publishers led to an enormous production of albums at the beginning of the 1980s. The album market flourished as never before, in France and Belgium, but also in The Netherlands. This only lasted for a short while: because of overproduction, the market collapsed in 1983.

The only publisher that did not react to the innovations described above with a comparable initiative was Dupuis. It would still take a decade after the first *Romans (A Suivre)* were introduced before they were able to reply with their own album series for adults. The change of policy at Dupuis in the middle of the 1980s was a direct effect of the new owners of Dupuis: Albert Frère's Groupe Bruxelles Lambert and Hachette in 1985.

#### **6.5.4 'Exit' by acquisition: loss of independence, but the evolutions continue**

##### **6.5.4.1 Phase 1: Albert Frère and Hachette: finally innovation**

The acquisition of Dupuis was a consequence of internal quarrels between the many Dupuis heirs, who all had shares in the Dupuis printing and publishing companies (De Laet, 1985). These quarrels were also a cause of the lack of initiatives at the comics division. Some of the family members wanted to profit from the money earned by the firm, but according to rules written down by founder Jean Dupuis this was impossible: all the profits should be re-invested in the firm. This eventually led to the acquisition already described in the introduction. Charles Dupuis retreated. Quite soon the new owners discovered that Dupuis was not as profitable as had appeared. The comics division was still mainly dependent on the album reprints from the first generation of *Spirou*-artists; the magazine was hardly a source of profits.

New blood was needed to develop ideas that would make Dupuis flourishing again, and able to compete. Jean van Hamme, now mainly known as the scenarist of many best selling comics series, was asked and assigned by Frère as the successor of Charles Dupuis (Bellefroid, 2008) in 1986. Van Hamme had already created comics scenarios since the late 1960s, but had combined this with his job as a manager for Philips until 1976. In that year he decided to make a profession of his passion, he quit Philips and became a professional scenario-writer, not only for comics, but also for tv-series. As the publisher of Dupuis he could combine his knowledge of comics with that of marketing strategies. Among his earlier comics were several one shot albums, that had been published in Casterman's *Romans (A Suivre)* series and in Lombard's series *Histoires et Légendes*. This inside knowledge made Van Hamme very aware of the changing audiences for comics. He knew that Dupuis should do something new to reshape their image, in order to get access to the adult audience that bought author's albums in comics shops. A magazine like (*A Suivre*) would be too risky, but a new albums series, based on the one-shot concept could lead to something. In the end his ideas led to the *Aire Libre (Vrije Vlucht* in Dutch) collection that was introduced in 1988. Philippe Vandooren, former main editor of *Spirou*, assisted Van Hamme in realizing the start of the *Aire Libre* series (Bellefroid, 2008, p. 7).

Van Hamme left Dupuis again after a year, even before the first *Aire Libre* album had been published, because he preferred to continue his career as a scenarist for comics. As a publisher of Dupuis he was succeeded by Jean Deneumostier, who had already been working for Albert Frère before Dupuis was bought (Bellefroid, 2008, p. 9). Vandooren continued *Aire Libre*, since 1987 assisted (and in 2000 succeeded) by Claude Gendrot, a Frenchman who had worked before as editor at Les Humanoïdes Associés in Paris. Gendrot knew many French artists and invited them for the new Dupuis collections.

In *Aire Libre* comics artists got the opportunity to draw a complete story, which did not have to be pre-published in a magazine. A variety of artists was invited to participate, not only the Dupuis-artists, but also those that worked for other Belgian and French publishers. Every year at least four titles would be published. The series got its' own logo; the Dupuis logo was even intentionally left away from the front cover of the books. Van Hamme's idea behind this was that the association of Dupuis with children's comics could prevent the new series to become a success. Only in 2002 would it be put again on the cover of the *Aire Libre* albums. At that time Van Hamme's original intentions had been realized: Dupuis was not associ-

ated just with *Spirou* and children's comics anymore, but also with innovative, serious adult comics.

Another advantage of the series was that Dupuis had something substantial to offer to young artists, who more than their predecessors wanted to have creative freedom in their comics. Dupuis became less dependent on the older generations of *Spirou*-artists. Just like the *Romans (A Suivre)* in their age, the *Aire Libre* series became one of the most prestigious album series of the 1990s and 2000s. More than 130 titles have appeared in *Aire Libre* since 1988. The series still exists today and sells quite well. This already started with the first part in the series, the dyptich *Le Voyage en Italie* by the Swiss artist Cosey; it sold 50,000 copies (Bellefoid, 2008, p. 27).

There are many similarities between *Aire Libre* and the (*A Suivre*) collections. Both are one-shots, both are author's albums, and in both cases the artists have the freedom to use as many pages as they need to tell a complete story. But the main difference is that most of the *Aire Libre* albums are not pre-published in a magazine, whereas this was the case for the (*A Suivre*) books and the Lombard and Dargaud one-shot collections. Again this was a step further in the evolution of comics as an independent medium; in this case the independence of prepublication as a feuilleton in an associated magazine.

Of course the other major publishers reacted on Dupuis' *Aire Libre*: in 1994 Lombard started the comparable collection Signé, and in 1995 Dargaud launched its' collection *Long Courier*; all series with a literary and arty 'touch'. In the 21<sup>st</sup> century this would continue: in 2000 Dargaud started Poisson Pilote, which introduced the work of the youngest generation of French artists, and in 2002 Casterman began with *Ecritures*, large paperback books that were their next generation comics after the (*A Suivre*) collections.<sup>1</sup> At that time the label author's comic, that had a French connotation, would be replaced by the American 'graphic novel'. This new label and the smaller size of new paperback collections like *Ecritures*, were part of the marketing strategy used by many comics publishers to get more access into bookshops.

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<sup>1</sup> The magazine (*A Suivre*) had been stopped in 1997, after twenty years. The Dutch edition (*Wordt vervolgd*) had already disappeared in 1989, after ten years.

These developments show how competition contributed to the evolution of comics. The mainstream publishers felt the necessity to react on artists' initiatives, on the changing tastes of audiences, but also on each other. French, Belgian and Dutch media strengthened this development: they acknowledged that the author's albums had many aspects in common with literature and with art house cinema, and paid attention to the comics artists and their albums (by means of reviews and interviews). Adult comics' collections of one-shot stories became one of the main formats of comics.

Nevertheless Dupuis has always remained a commercial publisher: only those albums are published in *Aire Libre* of which editors expect that they will earn their money back. Beginning artists that have not published comics before for Dupuis or for one of the other mainstream publishers will certainly not be published in the series.

#### **6.5.4.2 Phase 2: Média Participations: definite loss of independence?**

In 2004 Dupuis became part of Média Participations, which had already acquired Lombard and Dargaud in the 1980s. Even before this acquisition MP was already Europe's biggest comics publisher, but now, with a market share of 40% in the Francophone area (Bellefroid, 2005, p. 120), its' lead had become even bigger. MP has its headquarters in Paris. Although the CEO of MP, Claude de Saint-Vincent, immediately promised the Dupuis employees and artists that Dupuis would keep its editorial autonomy. In spite of this there were serious internal problems in 2006, when MP decided to fire the publisher and main editor of Dupuis, who had both been working there before the acquisition took place.

The editor in question was Claude Gendrot, who had been active for *Aire Libre* and other new series since 1987, and was popular among the artists. Many Dupuis artists of that moment, together with retired Spirou-artists and editors (like Yvan Delporte), in total more than 112 people, wrote a joint protest letter to MP. The employees of Dupuis went on a strike.

Former Dupuis publisher Jean van Hamme, who had become not only an extremely successful comics scenarist but also an important source of income for MP because of his bestselling series for Dargaud (*XIII*), Lombard (*Thorval*), Blake and Mor-

timer (an imprint of MP, where Van Hamme published his rendition of the classic comics series with the same name: *Blake and Mortimer*) and Dupuis itself (*Largo Winch*)<sup>1</sup>, wrote a personal letter of concern to De Saint-Vincent. As a reaction Van Hamme was asked by the latter to become publisher at Dupuis, but he refused. Instead, Van Hamme's wife (lawyer of profession) became intermediary between MP and the Dupuis employees. After promises by De Saint-Vincent regarding Dupuis' autonomy, it gradually became quiet again, but a number of artists had left the publisher in the meantime. It took some years, and more changes of publishers and editors before the situation had stabilized again (source of events after acquisition: *ActuaBD*). In spite of all these internal arousals, the supply of Dupuis albums remained high, mainly with regard to the French language editions. The prestigious *Aire Libre* series is also still intact and seems not to have lost its appeal to talented artists (Bellefroid, 2008).

Figure 6.7 shows the developments in the turnover of Dupuis in the period 2001-2010. The financial crisis might be reflected in the lower turnover since 2008, although in France (the largest market for Dupuis) the total sales of comic albums only started dropping in 2010.<sup>2</sup>

### 6.5.5 Differences between Dupuis' francophone and Dutch language market policy

#### 6.5.5.1 The magazine: *Robbedoes*

Industrial logics (i.e. efficiency) have become more important since MP's involvement in Dupuis. A consequence of this was a painful decision taken in 2005: the Dutch language version of *Spirou*, *Robbedoes*, was finally stopped after having

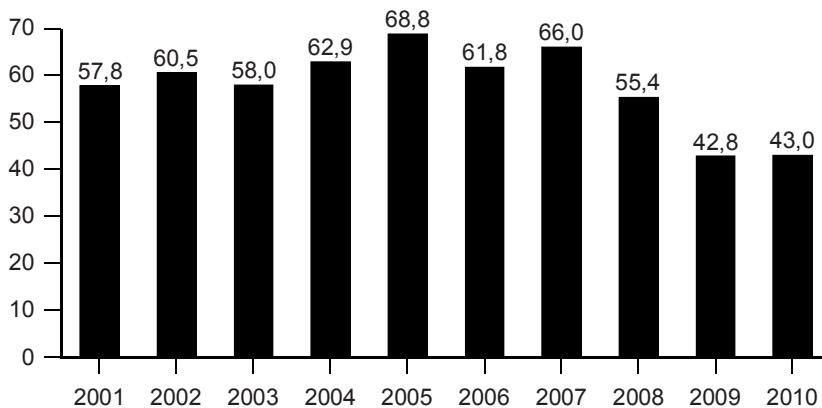
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<sup>1</sup> Each new installment of each of these series sells between 100,000 and 500,000 copies in France and Belgium alone (*ACBD* 2005-2010). For every series Van Hamme works together with a different artist. Together with Goscinny and Hergé, Van Hamme belongs to the bestselling comic scenarists ever. This led to his nickname 'Monsieur Dix Procents': during a number of years one in every ten francophone comic albums sold, was written by him (Miller, 2007).

<sup>2</sup> Total sales of comic albums in France in millions of Euros: 2007, p. 319; 2008, p. 319; 2009, p. 320; 2010, p. 314 (Guilbert, 2011).

been published for 67 years. Its' circulation had already been decreasing since decades, so it was not a surprising development, but it showed the impact of the acquirement by MP.

**Figure 6.7 Dupuis turnover 2001-2010 (in millions of euros)**



source: Orbis, 2011

Most editorial choices at Dupuis concerning magazines and albums have always been made by the francophone department of Dupuis. Although the first *Robbedoes* appeared in the same that *Spirou* was launched, and although until the end of the 1990s almost all French language albums were also translated into Dutch, the Dutch department was much smaller and always dependent on choices made by the Wallonian main office. There were hardly any Flemish or Dutch artists published in *Spirou*, and therefore their number was just as small in *Robbedoes*. Morris (real name: Maurice de Bevere; the creator of *Lucky Luke*), and Berck (Arthur Berckmans, active for *Spirou* and *Tintin* with several comics), who originally were Flemish, but who chose to create comics mainly for the French language market, are two of the few exceptions. *Robbedoes* was in fact a translated version of *Spirou*. Only editorial pages were produced especially for the Dutch edition (interview with Peter Middeldorp, 2009).

This continued until 2005, *Robbedoes*' final year, with only one exception: in a short period (1983-1985; before the first acquisition) the Dutch editors had been given the opportunity to add their own choice of originally Dutch language comics



to *Robbedoes*. They even had approval to fill half the magazine with Dutch and Flemish comics. The other half would still contain the translated *Spirou* stories. This initiative came from Pierre Matthews, a nephew of Charles Dupuis, who in that period was the publisher of the Dutch language division of Dupuis. *Robbedoes*-editors Wauters and Cavens introduced young Dutch and Flemish artists, among whom were Gerrit de Jager, Toon van Driel, Peter de Smet (Dutch artists, who were all well-known already in The Netherlands), Luc Cromheecke and Marc Legendre (Flemish artists, who had just started their comics career). Although one of the ideas behind the formula was that these artists would be translated into French for *Spirou*, this only happened for two artists: De Jager (in *Spirou* from 1985-1994 and 2002-2005) and Cromheecke (in *Spirou* from 1985 until now). Their sense of humour struck a chord with the *Spirou* editors, and apparently also with the readers (Van Eijck *et al.*, 1986; Brok and Van Eijck, 1986).

In general the results of *Robbedoes* with the new formula were not satisfying. Moreover the timing was bad, for in 1985 Dupuis was acquired by Frère's company and Hachette, and the Dutch editors were forced to limit their contribution again to just a few pages. In the years after that the editorial space for Dutch language contributions would become even more limited, so that in the final years of *Robbedoes* it was merely a thinner version of *Spirou* (it contained 32 pages, whereas *Spirou* counted 48 pages), without any editorial pages. This of course did not help *Robbedoes* very much. In 1985 *Robbedoes* still had 33,000 readers (Lefèvre, 1986, p. 41). In 2005, the final year of *Robbedoes*, the number of readers had dropped to the dramatically low number of 2,000 (*Wikipedia*, lemma '*Robbedoes*').

There are a number of reasons for the disappearance of *Robbedoes*, apart from the general negative tendency among comic magazines. MP was more French oriented than Dupuis was before its acquisition, and this led to indifference for the Dutch language part of the Dupuis comics (interview with Erwin Cavens, 2009). In addition, it was more focused on efficiency than the former owners. The Dutch language market was much smaller than the French market, too small for MP to pay much attention to. A second reason was that *Robbedoes* was mainly read in Flanders, and to a far less degree in The Netherlands. In The Netherlands *Robbedoes* was mainly read by subscribers to so-called 'reading portfolios'.<sup>1</sup> During its last

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<sup>1</sup> 'Leesportefeuilles': a collection of different magazines that subscribers can keep for a limited period, after which they are collected again and passed on to the next subscriber. There is a differentiation of subscription prices, depending on the number

years the magazine was not even available in shops in The Netherlands anymore, one could only subscribe to it. Of course the Dutch already had comic magazines of their own: the VNU magazines. *Sjors* had even published some of the most popular *Spirou* stories in the late 1960s and early 1970s (although years after they had appeared in *Robbedoes*), and certainly was a substitute for *Robbedoes*, just like *Eppo* after 1975. Moreover VNU almost had a monopoly position in The Netherlands for the distribution of magazines.

In Flanders *Robbedoes* was not as popular as *Spirou* was in Wallonia: Flanders' comics culture had always been based more upon newspaper comics than upon magazines (Dierick and Lefèvre, 1996). The many albums that are produced by the Vandersteen studios and are published by Standaard, but also most the other Flemish bestselling album series, are pre-published in newspapers.

#### 6.5.5.2 *The artists*

There are only a few Flemish and Dutch artists who started writing in Dutch and managed to get their albums translated in French by Dupuis. Among them are albums from the two Dutch language artists mentioned above that originally published in *Robbedoes* and were also translated for *Spirou*: De Jager (nine albums) and Cromheecke (seven albums). The Flemish artists Griffio and Marvano developed a career in the French language comics world, just like Morris and Berck had done before them. They published albums for Dupuis, but also for the other major French publishers. For Dupuis they contributed to the *Aire Libre* collection.

At Casterman and Lombard the situation is not very different: there are only a few Flemish and Dutch artists on their publishing list. In general there is a one-way traffic between French-Dutch language comics: the direction is French-Dutch, and hardly ever the other way around.

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of times that the magazines have been passed through to others before the subscriber receives them: the more read by others, the cheaper the subscription becomes.

### 6.5.5.3 *The albums*

Although many Dupuis albums have appeared on the Dutch market, there have never been serious marketing activities across the Dutch-Belgian border. The distribution of the albums in The Netherlands also has been a weak spot for a long time (Van Eijck *et al.*, 1986, p. 17; De Laet, 1985, pp. 46-47; Lefèvre, 1986). The last subsidiary of Dupuis in The Netherlands (in Sittard) disappeared in 1991: it had been too small to diffuse and distribute the albums effectively.

In 2000, before the acquisition by MP, Dupuis had started a separate Dutch division, De Stripuitgeverij. Dupuis, via De Stripuitgeverij, bought the rights of one of the most successful Flemish comics series, Jef Nijs' creation *Jommeke*, from original publisher Het Volk (interview with Erwin Cavens, 2009).<sup>1</sup> They also published other licensed comics and originally Flemish comics. Dupuis became the comics publisher with the largest market share in Flanders, directly after Standaard Uitgeverij, mainly because of the popularity of *Jommeke*. In 2008 the French orientation of the new owner MP led to their selling the Stripuitgeverij again. One of the Stripuitgeverij's former managers bought the firm and rebaptized it into Ballon Media.

Since then MP subcontracts the production (translation of French albums) and distribution activities of the Dupuis, Dargaud and Lombard albums for the Dutch language market to Ballon Media. This organization, which also still produces the *Jommeke* comics, is owned for 20% by Dupuis (thus indirectly by MP) and for 80% by Flemish entrepreneurs (Challe and Dujardin, 2010, pp. 20-21).

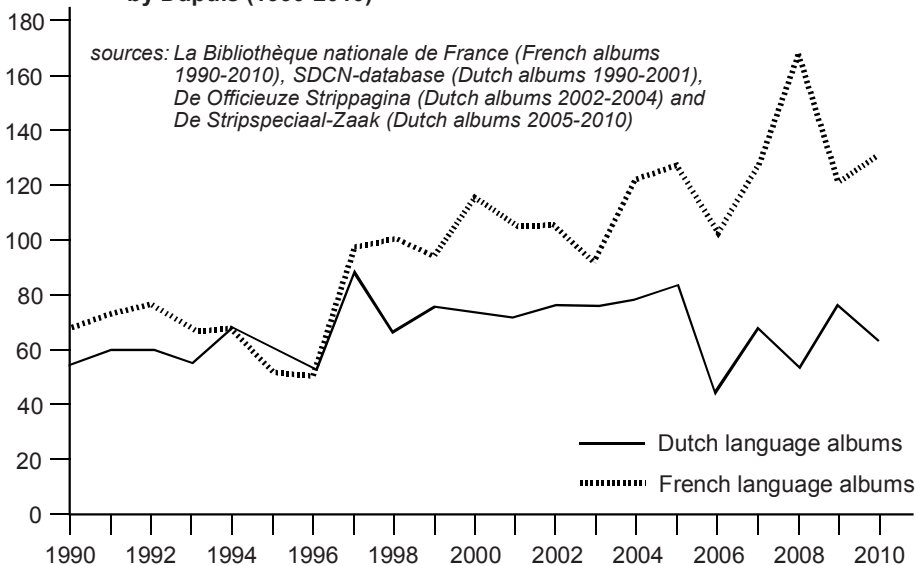
Until 1997 Dupuis had the policy to publish almost every album in both French and Dutch. After that year the numbers of Dutch translations were more limited. This tendency has become even stronger since Dupuis is part of MP (see Figure 6.8). Only those series are translated that will almost certainly sell well in The Netherlands and Flanders. If MP albums appear not to be suitable for the Dutch speaking market, the editors at Ballon Media (who have the knowledge of the Dutch language market) try to license the comics to smaller Dutch comics publishers (like Oog & Blik) for whom a translation can still be attractive, for instance

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<sup>1</sup> *Jommeke's* albums sold an average million copies a year in Flanders (Cloostermans, 2008). They were pre-published in newspaper *Het Volk*, already since 1957. 248 Volumes were published until Jef Nijs died in 2009.

because the author fits in their publishing list, or because they are small enough to be pleased with lower sales figures than MP. Although the *Vrije Vlucht* albums are not bestsellers in the Dutch speaking countries (and certainly not in The Netherlands), most installments are translated into Dutch, because just as *Aire Libre* in the Francophone area, *Vrije Vlucht* is one of the show-pieces of Dupuis in The Netherlands and Flanders.

**Figure 6.8 Differences in numbers of French and Dutch language albums published by Dupuis (1990-2010)**



In general the Dutch language market is less interesting for MP, because it is much smaller than the Francophone market and thus generates less income. This is not only related to the number of people who read comics, but also to differences between the formats of the albums in Flanders/The Netherlands on the one hand, and Belgium/France/Swiss on the other.

On the francophone market all albums have hard covers (made of cardboard), whereas on the Dutch language market only the more luxurious series (like *Aire Libre*) have a hard cover; most other series have a soft paper cover. These soft cover albums have far lower consumer prices (more than half as cheap as a hard cover album), so bookseller and publisher earn less money for each sold copy. The production costs of hard cover albums are a little higher, but certainly not twice as

expensive as those of a soft cover album (Lefèvre, 1986; interview with Erwin Cavens, 2009).

Dupuis did several attempts to introduce more hard cover series cover in the Dutch language market, but these failed (Dohmen, 1998, p. 23). Dutch and Flemish people are used to cheaper albums, because of the enormous (lowly priced) soft cover album supply of Standaard in Flanders (*Suske & Wiske* and many other series), and a comparable soft cover policy of the most productive publishers in The Netherlands: VNU and Sanoma, a policy that already started in the 1950s and 1960s.

In France and Wallonia, the relatively expensive hard cover comic albums were introduced by Casterman in the 1930s. Advantages of the hard cover, apart from the higher rate of turnover for bookseller and publisher, were that these albums fitted in the supply of bookshops (same prices as 'regular' books, same appearance) than the cheaper, magazine-like soft cover albums (Lefèvre, 1986). It is quite logical that Casterman chose for this format, because it is a book publisher (and in the 1930s had already been that since more than a hundred and fifty years), whereas Standaard and VNU are respectively originally newspaper and magazine publishers.

Art first Casterman only produced hard cover albums for the Francophone market. For the Dutch language market they used a hard cover for the first *Kuifje* editions in the 1940s and 1950s, but since the 1960s they also introduced cheaper, soft cover editions. The founders of Lombard and Dargaud (Raymond Leblanc and Georges Dargaud), who co-produced many series for Belgium and France until the 1980s, admired the 'chic' Casterman albums. Based on that format they originally produced hard cover albums, but later in the 1950s soft cover editions were published as well, mainly for Belgium (including Wallonia) and The Netherlands (Béra, Denni and Mellot, 1996, Matla 1998). Dupuis varied with its album formats in the francophone area: some series had a hard cover (*Gaston Lagaffe*), others (like *Lucky Luke*) a soft cover, mainly depending on the personal preferences of Charles Dupuis (Dayez, 1997, p. 131). The Dutch language Dupuis albums usually had soft covers.

Quite remarkable is that in the early 1980s Dupuis, Lombard and Casterman decided together to publish only hard cover albums for the whole francophone area.<sup>1</sup> France had already been used to hardcover comic albums since the 1930s, but now this format also became the only one for Wallonia. A consequence of this francophone unity was that the differences within Belgium (between Flanders and Wallonia) became bigger. Although this strategy was mainly chosen for economic reasons, it is plausible that the hard cover format and the higher price have contributed to a higher status of comic albums in the francophone area than in Flanders and The Netherlands.<sup>2</sup>

But apart from differences between language areas, there are also differences within these areas, for example The Netherlands and Flanders. In general a Dupuis album sells twice as much in Flanders as in The Netherlands, according to editor Erwin Cavens (interview with Erwin Cavens, 2009). These proportions are confirmed by the Dutch language editor of one of Dupuis' competitors, Casterman (interview with De Jonckheere, 2009). If one takes the population sizes of The Netherlands and Flanders into account (respectively 16 million and 6 million people), this leads to the conclusion that the average Flemish person buys five times as many comic albums (at least albums from these publishers) as the average Dutchman; an illustration of the differences in comics cultures between both countries.

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<sup>1</sup> According to information from Casterman's Dutch editor De Jonckheere (source: interview with De Jonckheere, 2009).

<sup>2</sup> A hard cover album looks like a book, and is just as expensive. Soft cover albums are more like magazines, because of cover, size and price. Books are commonly seen as cultural products with a long lasting value, whereas magazines are commonly seen as mass consumption products with a temporary value: after having been read they can be thrown away. Especially the Flemish *Standaard* albums and the Dutch VNU/Sanoma albums with Disney characters are produced at a much higher pace than the Wallonian and French albums: every three months a new *Suske & Wiske* album appears, and every month a new Disney album. The average Wallonian or French artist produces only one new album every year. So with regard to regularity of appearance, the best sold Dutch and Flemish albums are indeed more like magazines than like books.

### 6.5.6 Logics and value regimes

At the level of the editors at Dupuis, there has always been a mixture of inspired and market logics. The first important *Spirou*-editor, Yvan Delporte, was as much an editor as an artist himself, because he also wrote stories for artists like Franquin, with whom he collaborated closely. Together with Franquin he was the initiator of the innovative, but badly positioned *Trombone Illustré*. At the same time he was aware of the interests of *Spirou*'s audience, the restrictions of the French youth law, and the moral (catholic) convictions of the Dupuis family. He was controlled by Charles Dupuis, but self-censorship was often more important than censorship from above.

His successors Philippe Vandooren and Thierry Martens also combined a keen eye for the *Spirou* audience with a genuine interest for the medium and for the artists with whom they worked together. Both men wrote books about comics (Vandooren 1969, about the creative process behind comics by Franquin and Jijé; Martens *et al.* 1980, about the history of Belgian and French comics), that became classics among comics fans.

Recent editors like *Spirou*'s Patrick Pinchart, and album editor Claude Gendrot belong to the generation of comics fans that have transformed their hobby (a love for comics) into a profession, and that have been caught by comics' singularity. Pinchart had already started his own comic fanzines on a young age, and produced radioshows dedicated to the same subject. Gendrot had already worked at Les Humanoïdes Associés before he came to Dupuis; working with comics artists is the best job imaginable to him. The same can be said about Erwin Cavens, former editor of *Robbedoes*, and now editor of the Dutch language albums of Dupuis. He is market-oriented, but at the same time his passion is to work with artists and to create attractive albums for the right audience.

At the level of the publisher, there is also a mixture of values. Charles Dupuis was certainly inspired when he started *Spirou* at the age of nineteen. He was able to attract the most talented Belgian comics artists available at that time, and if Hergé had agreed, *Tintin* would also have been part of *Spirou*. At the same time he could think commercially. The idea for the 48 pages limit to Dupuis albums, in order to use paper efficiently (and therefore an industrial value), probably came from Charles' brother Paul, who owned the printing division of Dupuis, and who was the financial expert in the family. Charles was the most artistic of the Dupuis family

(the reason for ‘giving’ him *Spirou*). He was attached to his artists in a paternalistic way, and could also become emotional about them. He could not stand it if they left Dupuis for another publisher, and in some of those occasions started to cry, hoping that they would change their minds. At a later age, he was not able to introduce the necessary changes to the company.

His successor for a year, Jean van Hamme, was able to do that. He had left a safe job at Philips, for an uncertain position as a comics scenarist, because that was his passion. At the same time, he wanted to reach a broad audience. His mixture of inspired and market values enabled Dupuis to get a new image, better fitting to the demands of the time, with the introduction of the *Aire Libre* series. An advantage of this series was that new, talented artists (that are a comics publishers’ most important resource) became attracted to Dupuis.

The present owners of Dupuis, Média Participations (MP), combine market and industrial logics. Some of the efficiency measures they took were necessary to improve the position of Dupuis. However, as can be deduced from the description above, in the perception of the Dupuis artists they formed a threat for their artistic autonomy. The Dupuis artists assumed that MP only used market logics, and MP had some troubles to convince them that this was not the case.

### 6.5.7 Conclusions

There are several evolutions of comics that Dupuis was involved in, either as an explorer or as an exploiter. The first one concerns Dupuis’ launch of *Spirou*, one of Europe’s earliest independent comic magazines with balloon comics. Before the war, it was filled with Belgian, French and American comics, but out of necessity (during the war) it developed into a completely Belgian comic magazine. The Belgian artists were inspired by one of the founders of the European comic: Hergé, but developed their own styles afterwards. Because of its wide audience (in the francophone countries and in the Dutch language areas) and the talents of the artists it also influenced other magazines and artists. The competition with *Tintin* magazine played an important role in the high quality of the magazine.

The second development was that of the formula of prepublication of a part of a comic feuilleton in the magazine, and publication of the whole comic as an album



afterwards. Part of that same formula was an efficient use of paper, which limited the length of the albums to 48 pages. This concept was later copied by other publishers, including Lombard, Dargaud and the Dutch VNU. When in the 1970s the magazine became less widely read, Dupuis extended their album series production that from then on became the most important source of income.

In the second half of the 1970s comics drew the attention of a new audience: adults, who had been raised with children's comics, but who now expected comics that fitted with their interests as adults. At the same time comics artists wanted to have more independence –in a sense they had reached artistic adulthood (Boltanski, 1975). France was the first European country where the artists revolted. Dupuis reacted, but only at the initiative of an artist and a former editor, with a temporary annex to *Spirou*. This failed, because it contained adult comics, but was part of a children's magazine.

In 1978 Dupuis had started an album department, but the editors were limited in their choices for the albums: they could only choose between comics that had appeared before in *Spirou*. Dupuis did not 'co-evolve' with its environment.

Dupuis would only catch up again after its first acquisition. A new publisher with inside knowledge developed strategies that enabled Dupuis to get a new image among the adult albums audience. The *Aire Libre* series was one of the results. Although Dupuis exploited its earlier success and copied the innovations that other publishers (independent French publishers like Les Humanoïdes Associés and Audie, and majors like Casterman) had already introduced, with regard to one-shots and adult-oriented author's albums, it also *explored*, because Dupuis went one step further: the stories in the albums were not necessarily pre-published anymore.

The first acquisition contributed to Dupuis' renaissance and survival. The market logics behind these changes went accompanied with inspired logics on the editorial level: editors with a network among young (French and Belgian) comics artists got empowered to choose and guide those talents that were needed for the production of the new album series.

The second acquisition by Média Participations led to more industrial logics, and this resulted in a conflict with the inspired part of the company (artists, editors), but also with the other personnel. Artists and editors expect more autonomy than in the

1950s and 1960s. If they are of the opinion that this is not respected they leave, and the publisher is left empty-handed. After guarantees concerning editorial autonomy, Dupuis' ambidextrous editorial policy seems to be consolidated. Dupuis is active on more comics markets at the same time: it still publishes new children's comics, reprints the old, classical series, and in addition is active on the adult album market with innovative, artistic series.

## 6.6 BRIES<sup>1</sup>

### 6.6.1 Introduction

Bries is a small Flemish *de novo* publisher from Antwerpen, specialized in producing innovative comics in varying sizes, and with varying styles. Most of the Bries comics have an artistic appeal, although some are more like traditional cartoons. In spite of the variety of drawing styles of the Bries artists, the publishing list of Bries shows a coherence that is probably caused by the fact that only one person is responsible for the editorial choices: Ria Schulpen, also the founder of Bries.

Bries publishes comics since 1999, and has contributed considerably to the 'new wave' of Flemish comics in the 1990s and 2000s (see also Meesters, 2010 and Zeegers, 2009). Bries was able to do this because it mainly publishes young comics artists, often Flemish (but also Dutch, German and other nationalities), who had not or hardly ever published before, or if they had, this was mainly done by small press organizations.

Although many Bries comics are related to the artist-owned small press, Bries is professional. It unfolds its' activities under the structure of a VZW ('Vereniging Zonder Winstoogmerk': a non-profit foundation). Just like Oog & Blik and many other *de novo* comics publishers, Bries is still relatively young. The publisher has only witnessed (and stimulated) evolutions of comics in the last decade, and therefore the case will be shorter than the Dupuis and VNU case. For the case analysis the next sources were used: an interview with Ria Schulpen (2009, founder and

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<sup>1</sup> Appendix VI contains a table with an overview of the evolutions at Bries.

single owner of Bries), the Bries publishing list (1999-2010; a complete list, derived from Bries' website), two recent reports about Belgian publishers of comics and youth books, and about the artists in these industries (Challe and Dujardin, 2010, Lefèvre and Di Salvia, 2010), and finally two papers about the Flemish new wave of comics (Zeegers, 2009 and Meesters, 2010).

### 6.6.2 Entry

Bries started as a comics library in Antwerpen in 1985. At first this had an informal character, and since 1990 it has the legal status of a foundation (in Flanders VZW), with the name *VZW Breeze*. Ria Schulpen had founded this library with the intention to make a living with it, next to her regular job, as a city librarian. In the middle of the 1990s, while visiting *Strip Turnhout*, the biggest annual comics festival in Flanders, she discovered small press comics.<sup>1</sup>

Since the beginning of the 1990s there has been a wave of individuals and collectives of comics artists who were active in the international small press scene. The most consistent (with regards to editorial policy), long lasting, and influential publisher formed by a collective of artists is the French L'Association (founded in 1990 by six comics artists, and still in existence today). In 1995 the organization behind *Strip Turnhout* published the anthology *Formaline*, a book with almost 300 pages filled with comics by a large number of independent comics artists. The

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<sup>1</sup> Small press comics are comics produced and distributed by the artists who created them, individually or as collectives, usually on a small scale, and without the status of a corporation. As a consequence small press comics mostly do not have an ISBN, and are not distributed via the regular book selling channels. They are obtainable at the better comics shops and at comics festivals. At festivals small press artists present themselves and their publications, not only to an audience, but also to each other. Small press comics are an international phenomenon, related to alternative artistic 'scenes' in the United States and many European countries. Often these publications are the only outlet for young, experimenting comics artists, but sometimes the artists choose consciously to remain in the small press circuit, because this leaves them complete autonomy. This allows them to experiment with the conventions of the medium, with regards to drawing and narrating techniques, but also with regards to publication formats.

artists came from all over Europe, including Flanders and The Netherlands. Founders of L'Association were also present in the book.<sup>1</sup>

Schulpen was amazed by the variety and richness of the comics she saw in Turnhout, and decided that she wanted to promote them. At first she did this by distributing small press artists to comics shops, and to comics festivals which she visited (in Belgium, but also in The Netherlands, Germany and even the United States). She sold the books from her comics library and started a comics shop, specialized in international small press comics, and after that she also started publishing. Her first publications, with the label *VZW Breeze*, were four issues of the small press magazine *Verdomd Goed Tijdschrift* (Damned Good Magazine) in 1996 and 1997. In 1999 Schulpen decided to work more professionally as a publisher, and introduced the name Bries for all her publishing activities. Since then *VZW Breeze* has been active as a comics shop and a publisher. The first comics that Bries published were from artists that Schulpen already knew from Antwerpen, or that she had met at various international comics festivals.

Because of the small market potential for alternative comics, even in Flanders, many Bries comics are published in English to make them more attractive for foreign markets. There is another reason for choosing the English language: in the area of alternative comics the taste of the audience (partly formed by artists themselves) does not differ as much between countries as it does with regard to many mainstream comics, and most potential readers in the scene are able to read (and speak) English. Therefore Schulpen expected that the Bries publications would indeed sell as well in Belgium as in other countries.

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<sup>1</sup> L'Association repeated the *Formaline* concept a few years later, but on a much larger scale: in December 1999 they published the anthology *Comix 2000*, with the work of more than three hundred (mainly young) artists from twenty eight countries. Submissions for this book had to comply to two restraints, related to contents and format: the comic should be a personal interpretation of the 20<sup>th</sup> century, and words were not allowed - only images. *Comix 2000* counts more than two thousand pages, and is a manifestation of the variety of comics created by young artists at that moment. With this enormous book L'Association definitely profiled itself as the catalyst behind alternative, author- owned comics publishing.

In 1999 Schulpen published four comics under the label *Bries*. The very first *Bries* album was called *Wind*, the *Bries Anthology*. This ambitious book basically has the same concept as the anthology *Formaline* from 1995, but its territory is expanded with America. *Wind* counts 168 pages, and has contributions by 31 artists from 13 countries; some of them had also published in *Formaline*. Most artists are young; they come from the small press, and are unknown to a wider audience. The 'Intro' (introduction) in the anthology contains statements that can be considered the editorial mission of *Bries*. It shows the personal involvement of Ria Schulpen:

*Welcome to Wind, the Bries anthology!*

*Through Wind, I'd like to offer you an open and refreshing  
view on young, contemporary alternative artists.*

*Through Wind, I'd also like to build a bridge between the  
world of comics from the old and the new continent.*

*This anthology will therefore feature artists from both Europe  
(Denmark, Germany, The Netherlands, Italy, Serbia, Finland,  
United Kingdom, Slovenia, Belgium) and the USA.*

*You may find this compilation incomplete and subjective.*

*Well, you're right, it is.*

*Of course, Wind reflects my own (broad) taste.*

*Let Wind be a tool for you to discover  
unknown artists.*

*Enjoy!*

*Ria<sup>1</sup>*

(Schulpen, ed., 1999, p. 1)

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<sup>1</sup> In the book the word 'Ria' is rendered as a printed version of the hand written first name (signature) of the publisher. This signature and the fact that only the first name is mentioned, in the introduction to the first publication of *Bries*, contribute to the impression that is aroused of a strong personal involvement of Ria Schulpen in the *Bries* publications. Explicit personal involvement is what *Bries* has in common with other (often less professional) small press publishers. It is one of the things that distinguish alternative comics publishers from larger, industrially operating publishers.

The other comics that appeared in 1999 were a small book by the Flemish artist Mark Horemans (artist name RayMan), a combination of two related comics by the Dutch Willem Verburg, and the first issue of the comic magazine *4Eyes*, with contributions from three artists from Antwerpen. Already with these four debut publications Bries made clear that its focus was on young, unknown comics artists that experiment with the medium. Because of the use of the English language, Bries also showed that it had international aspirations, be it on a small scale: the printing circulation of Bries' comics in general does not exceed 1000 copies (interview with Ria Schulpen, 2009), and reprints are exceptional.

Just like the small press that supplies most artists for Bries, the publisher experiments with formats. Schulpén deliberately chooses formats that are different from the industrial album format (introduced by Casterman, Lombard, Dupuis, Dargaud and Standaard), that has become the standard for the large comics publishers. Ray Man's *Onomatopeia* is a mini-comic book, with a size of only 10.5 x 12 centimeters. The Verburg comics exist of a small oblong book with a larger, almost square-format comics book. The *4Eyes* magazine also has this square size, and *Wind*; The *Bries Anthology* has the size of a paperback: the same size that now has become the standard for graphic novels and that makes it suitable for distribution in bookshops.

#### 6.6.2.1 Conclusion

Bries started as a publisher, in order to add more variety to the existing supply of comics, and to introduce young, mostly still unknown comics artists from the small press scene to a wider, international audience. These artists experiment with new formats and with new styles of drawing and narrating, using the comics medium in an innovative way. They are consciously looking for directions that differ radically from the industrial standards and formulas imposed on the medium by the mainstream comics publishers. The founder of Bries started her activities in the field of comics because she loved the medium. She did not aim for profit by means of her comics publications. The publisher has international ambitions, but is focused on readers of alternative comics.

### 6.6.3 Evolutions

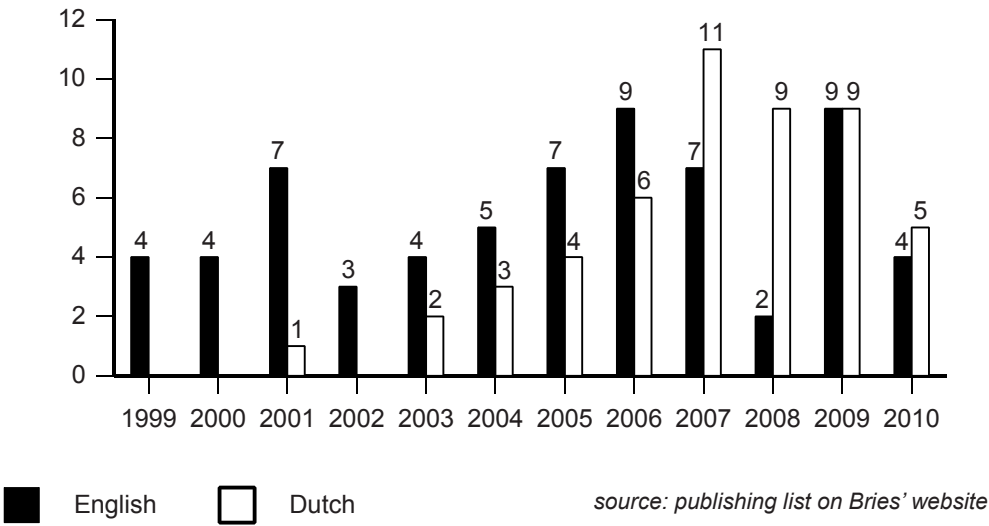
In the years after the entry in the field of comics publishing Bries continued to produce albums in varying formats, by artists from differing countries. Since 2000 Bries also published albums with a traditional format (21 by 27.5 centimeters, 48 pages). Bries did not constrain itself to experimental comics: some of the albums contain gag comics and cartoons that appear quite traditional. *The Boerke* (*Dickie* in English) albums by Pieter de Poortere provide the best example. However, even these comics often have a twist that makes them more absurd or cruel than the average gag comic.

In 2000 the first Bries production appeared that was (co-)financed by an art funds. This was the third volume of the magazine *Eiland* by the two Dutch artists Stefan van Dinther and Tobias Schalken. After Van Dinther and Schalken had financed the second volume of their self-published magazine by means of crowd-funding (every page of *Eiland* No. 2 was sponsored by different individuals or organizations), this third volume was published by Bries, on Schulpen's initiative, and was subsidized by the Dutch FBKVB (Funds of Visual Arts, Design and Architecture). This was one of the comics publications that profited from Joost Swarte's initiative in 1998 (see Section 6.4 about Oog & Blik).

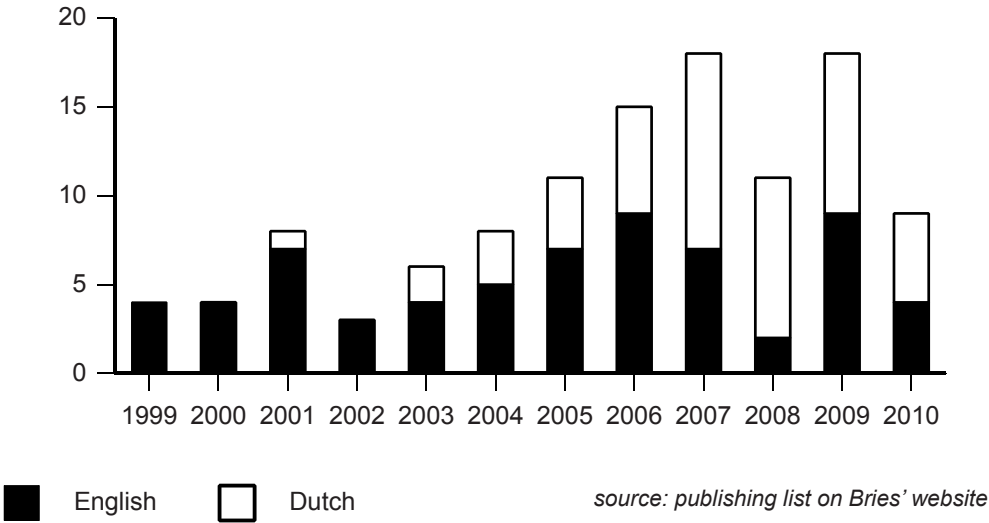
In 2001 comparable measures to support comics were taken in Flanders, but here the comics subsidies were part of the Vlaams Fonds voor de Letteren (Flemish Literary Funds) (Meesters, 2010, p. 118). The Funds supports young comics artists, co-finances the production and the translation of innovating comic books. Together with the other Flemish independent, innovative comics publisher Oogachtend, Bries has received the largest amount of subsidies for co-financing the comic albums by Flemish artists (Lefèvre and Di Salvia, 2010). Most of the Flemish Bries artists also receive (or have received) subsidies (a.o. De Poortere, Van de Perre, Schrauwen, Vandewiele, Spruyt, and Paquet; source: Lefèvre and Di Salvia, 2010).

In total Bries published 115 albums and magazines in the period 1999-2010. After a few years, more albums from Flemish and Dutch artists were published in two editions: a Dutch and an English one. Gradually more albums appeared that were only published as a Dutch edition. Since 2007 the Dutch language albums form the majority on the Bries' publishing list, as can be seen in Figure 6.9.

**Figure 6.9a Comics published by Bries in the period 1999-2010, by language**

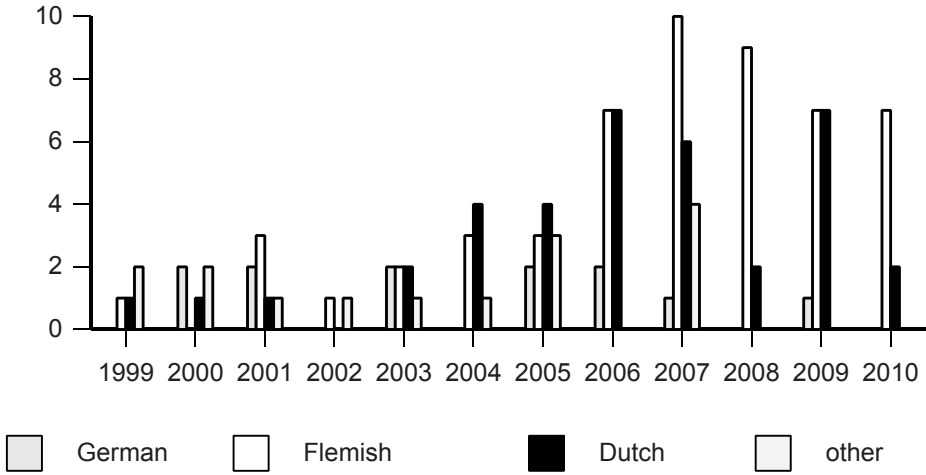


**Figure 6.9b Total comics published by Bries in the period 1999-2010**



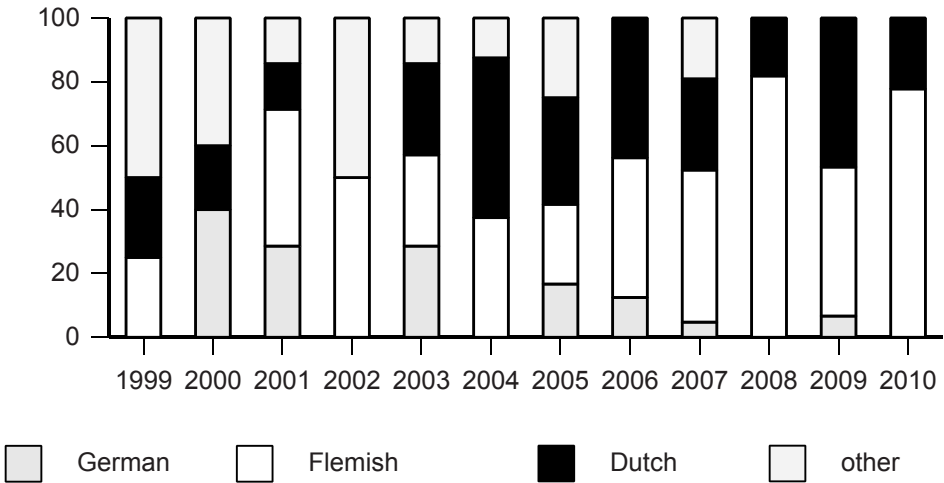


**Figure 6.10a** Share of artists by nationality in Bries' yearly album production



*source: publishing list on Bries' website*

**Figure 6.10b** Proportions of share of artists by nationality in Bries' yearly album production



*source: publishing list on Bries' website*

The English editions decreased in numbers, because Bries had problems to get access to foreign markets, in spite of the internationally oriented small press world. Schulpen found out that local publishers were better equipped for this, and therefore a translation or a co-production would be a better strategy to export the albums. Some titles from Dutch and Flemish artists mainly addressed the Dutch language market, especially the more cartoon-like comics. Schulpen found out that the humor of some artists did not appeal to readers in other countries.

After 2003 Bries gradually produced more comics every year, but the numbers would remain quite modest in comparison with those of the larger publishers (see Figure 6.9).

Bries published individual albums by thirty-four artists. Fifteen of them are Flemish, ten Dutch, four German, and then there are smaller numbers of artists from France, Italy, Finland and the United States. During the last years, Bries' focus is more and more on albums by Flemish and Dutch artists, and less on artists from other countries, as is shown in Figure 6.10.

Bries has published some albums in cooperation with publishers from other countries and from Wallonia. This was done to share the costs, but also to be able to distribute these albums better in other countries. In these co-editions the French-Wallonian, artistic small press Frémok participated three times: in an album by the German artist Anke Feuchtenberger (in 2006), the French Frédéric Coché (in 2005), and the Dutch Steven van Dinther (in 2005). Although Frémok's comics are generally more radical and more experimental than the average Bries' albums, they are probably the most logical partner for Bries on the French-Belgian market.

Bries also published an album by the French artist Lewis Trondheim in cooperation with the French mainstream publisher Delcourt (*Mister I*, 2005). Before that, Bries had already published a translated version of another title in the same series by Trondheim (*Mister O*, 2003), that had also been published by Delcourt, but at an earlier date (2002). The cooperation with a mainstream comics publisher like Delcourt is remarkable for Bries, but can be explained by the artist and his style: Trondheim is one of the initiators of L'Association, the influential comics artist collective from France that also started as a small press publisher. Among his many comics are bestselling parodies on fantasy comics, but also minimal, absurd cartoons. The *Mister I* and *Mister O* albums by Trondheim belong to the second category, and fit into the Bries publishing list.

Translations of a comic published elsewhere at an earlier date are exceptions on the Bries publishing list. Apart from Trondheim's *Mister O* the only other one is *W the Whore* by Anke Feuchtenberger (2001) that was originally published by L'Association in 1999.

The other way around, the rights of some Bries productions have been sold to foreign publishers. Quite exceptional is the case of Olivier Schrauwen's debut graphic novel *My Boy* (2006). The translation rights of this album have been sold to publishers in six other countries (Lefèvre and Di Salvia, 2010).

In 2008 and 2009 Bries co-edited two graphic novels by the Dutch artist Hanco Kolk in his *Meccano* series with the Dutch publisher of literature and comics De Harmonie (the former partner of Oog & Blik, see Section 6.4). The publishers agreed that Bries would distribute the albums in Belgium, and De Harmonie in The Netherlands. Bries participated, because the involvement of De Harmonie would enhance the chance of a better distribution in the Dutch bookstores. The first album was a compilation of stories that had appeared before in five separate installments at Bries, and the second album was a compilation of shorter stories that had been published before by several Dutch publishers, one of which was De Harmonie. Because both publishers had already invested in Kolk's books before, it was logical that they would join forces for the graphic novels.

After Bries first *Wind*-anthology in 1999, it published two other, lengthy anthologies in 2004 and 2007: *Hic Sunt Leones* Volumes 1 and 2. They are completely dedicated to Flemish artists. The titles are an allusion to the lion of Flanders, but also to the new wave of young Flemish artists that filled the pages of both books. These anthologies demonstrate that gradually Bries focused more on Flemish artists (and to less extent on Dutch ones). Both books were subsidized by the Flemish Literary Funds, and appeared in separate Dutch and English editions.

The number of talented Flemish comics artists has grown since a new Dutch language department was founded in 1998 within the St. Lukas Art Academy in Brussels that had delivered many French language comics artists before (the francophone program for comics artists in Brussels was already started in 1968). Together with the possibilities to get grants for comics publications this led to more variety in Flemish comics. In the decades before most Flemish comics artists who aspired a professional career worked in the style of the classical Flemish comics by Vandersteen, Sleen or Nijs, or they tried to work for the Francophone publishers,

like Marvano, Griffo or Dupré had done, with a francophone scenarist (at Lombard and Dupuis). The first option was unattractive for most young, ambitious artists who wanted to develop their own style and to write for an adult audience, and the second almost impossible, because of the preference among francophone editors for Wallonian and French artists. The combination of the new program and the support from the literary funds offered alternatives. Bries produced both anthologies in a Dutch and an English version, so that foreign publishers could also become interested in these artists, and hopefully contact them for further publications.

At the same time that Bries promoted a new generation of comics artists by means of the *Hic Sunt Leones* books, other artists left the publisher for a larger publisher. Pieter de Poortere had been working for Bries during a long time. His *Boerke* albums were one of the (modest) ‘hits’ of Bries. De Poortere got an offer from the large, mainstream French publisher Glénat to publish his further *Boerke* (in French *Dickie*) albums there. The Dutch language edition of the first *Boerke* album that appeared at Glénat was licensed by Oog & Blik / De Bezige Bij. Schulpen could not do otherwise than accept De Poortere’s departure.

A comparable thing happened with Willy Linthout. Linthout was already very successful in the commercial part of the Flemish comics world with his *Urbanus* comics, published by Standaard. He wrote a much more personal and serious, autobiographical comic for Bries, *Het Jaar van de Olifant*, in eight installments (2007-2008), based on the suicide of his son. The compilation of these installments, a graphic novel with 181 pages, surprisingly did not appear at Bries, but at Meulenhoff/Manteau in 2009 (at that time Meulenhoff/Manteau was the literary division of the Dutch-Belgian publishing conglomerate PCM; Standaard, the publisher of Linthout’s *Urbanus* comics, also was a division of PCM). Nevertheless Ria Schulpen was the publisher who had invested in the series at first. Meulenhoff/Manteau and Standaard had not dared to take that risk, but only took the decision to publish the graphic novel, after Linthout’s series at Bries had received positive media coverage. For artists like De Poortere and Linthout large publishers can be more attractive than a small one like Bries, because they have more means for promoting the book and because they have better access to the (international) market.

This competition with larger, mainstream publishers, who exploit the most successful innovations that originally were introduced to the market by exploring, alter-

native publishers like Bries, is one of the biggest problems for the survival of the latter type of organizations.<sup>1</sup>

Bries sells its albums via the Flemish comics distributor Pinceel, who mainly works with the smaller comics publishers (although not restricted to alternative publishers), and who distributes comics in Flanders, but also in The Netherlands, Wallonia and France. In The Netherlands the Bries comics are distributed by Strips in Voorraad since 2004, and before that year by Het Raadsel. In Belgium the Bries books are not only available in comics shops, but also in the FNACs and bookstores. In The Netherlands their availability is limited to the better comics shops. According to Ria Schulpen the sales of her albums in The Netherlands started to drop already in 2002, two years before Het Raadsel went bankrupt (see Section 6.4). The disappearing of Het Raadsel in 2004 even worsened the situation. Since then Bries sells far more comics in Belgium than in The Netherlands, even albums by the Dutch artists.

#### 6.6.4 Logics and value regimes

The value regime of Ria Schulpen is dominated by a combination of inspired and market logics. She only publishes the comics that she likes. Her aim is to give a broader access to comics that before publication by Bries were only distributed in the small scene of small press artists. She does not aspire to grow into a large mainstream publisher, and therefore she chose the structure of a non-profit organization for Bries.

Most of her activities in the comics field are unpaid: with the library, and later the shop and the publisher, she just earned enough to cover the costs. Schulpen got her main income from her job at the Antwerpen city library. The Bries library and comics shop were open for four, respectively three days a week. The remaining days she worked for the city library. The evenings and weekends were reserved for publishing activities, including visits to Belgian and foreign comics festivals. Three jobs (of which two unpaid) in the end were too much for Schulpen; in 2007 she decided to quit with the shop. All her activities show that Ria Schulpen was struck

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<sup>1</sup> The pamphlet *Plates Bandes* (2005) by L'Association co-founder J.C. Menu deals with this topic, from the perspective of the alternative comics publishers.

by the singularity of comics, especially by the small press comics in all their varieties of formats and drawing styles. This also shows through in the answer on my question about the birth of Bries as a publisher:

*After a number of years, in 1996, 1995 or 1994, I came into contact with small press in Turnhout [Strip Turnhout, the largest Flemish comics festival - RdV]. It was the first time I was there. One of my friends also made these comics. And when I went there, it was a complete revelation to me. And I bought these books myself and tried to sell them to shops, and I tried to distribute them. A logical next step, after having been busy with these titles for a number of years, was to publish them myself.<sup>1</sup>*

(Interview with Ria Schulpen, 2009)

So, the impression that these comics made on her, led to her choice to become a publisher. It also contributed to her perseverance in a niche that is so small, that it is very hard to earn a living. The effect of singularity that small press comics had on Ria Schulpen is related to their authenticity. These books are in many aspects the opposite of comics from the large Belgian and French mainstream comics publishers that work with fixed formats and that have constraints on the contents. One has to keep in mind that at the time that Bries became active as a publisher, there hardly were any other Flemish comics publishers that dared to introduce comics for an adult audience by young, innovative artists. The series published by Standaard (a.o. *Suske & Wiske*), almost had a monopoly position in the supply of originally Flemish comics. Small press comics can be considered as the artistic reaction to mass-produced industrial comics like *Suske & Wiske*.<sup>2</sup> They are not an industrial

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<sup>1</sup> Na een aantal jaren, in 1996, 1995 of 1994, was ik op Turnhout in contact gekomen met small press. Het was de eerste keer dat ik daar was. En een van mijn vrienden was er ook mee bezig, zelf stripjes aan het tekenen en zo. En daar ben ik naar toe gegaan, het was gewoon een hele wereld die voor mij open ging. En daar heb ik zelf die boekjes aangekocht en proberen ze door te verkopen aan winkels, ik heb ze proberen ze te verspreiden. Wat daarbij een logische stap was, om na een aantal jaren als je met die titels bezig bent ze echt gaat uitgeven.”

<sup>2</sup> The long-running series of *Suske & Wiske* albums published by Standaard provide a good example of the industrial and market values underlying the formulas of these comics. They have had (almost) the same format for decades for causes of efficiency (reduce paper and printing costs), but also in order to stimulate brand recognition. They

product, but the outcome of a creative process of an individual, with little or no interference from other actors (with market and industrial values). These comics are only made in very small circulations, every book looks different (with regards to format, contents, drawing style), and they address adults.

### 6.6.5 Conclusions

Bries has kept its' idealistic, artistic ambitions after the entry in the comics market. It has remained small and independent, and although Ria Schulpen's comics are professional publications, Bries still is closely linked to the small press movement. The comics have evolved from mainly English language, international productions, into mainly Dutch language productions by Flemish and Dutch artists. The growth of the number of young, talented Flemish artists was stimulated by a new institution: a Dutch language department at the St. Lukas Art Academy in Brussels, and a governmental foundation that co-finances innovative Flemish comics. Bries' promotional role for small press comics in general, has changed into promoting new, artistic, Flemish (and Dutch) comics, in Flanders and The Netherlands, but also internationally. However, Bries only has been able to survival by operating on a small scale, not much larger than the average small press publisher, but certainly more professional.

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always have the same characters, and are drawn in the same style. *Suske & Wiske* were invented by Willy Vandersteen, but his style was copied by his successors. The name of Vandersteen was on the cover even after he had stopped drawing and others had taken over the series. The names of the actual creators stayed anonymous for a long time, because Vandersteen had become a brand name, just like Walt Disney. The brand Vandersteen was more important (as a marketing tool) than the names of the individuals who actually created the comics. These artists worked in a studio, every one doing a small part of the comic (scenario writing, penciling, inking, coloring), just like in other types of traditional industries.

## 6.7 CASE ANALYSIS

### 6.7.1 Introduction

The individual cases of comics publishers described and analyzed individually in the previous sections provide a lot of information. In order to be able to compare the cases systematically with the use of theory, the propositions introduced in Section 6.2 will be explored. I want to stress the word explore here. A case analysis is not comparable with a statistical analysis, because of its qualitative nature. But by making use of theoretical knowledge developed earlier, the case analyses can lead to new insights, both with regard to the comics publishers and with regard to the theories themselves.

Attention is paid to the capabilities of the *de alio* and the *de novo* comics publishers (Subsection 6.7.2), and to the values of the publishers (Subsection 6.7.3). These findings are related to two theories that provide a deeper understanding of the outcomes of this part of the analyses (Subsection 6.7.4). The influence of the societal effect on the publishers will be explored in Subsection 6.7.5.

This section contains recapitulations of relevant information from the case descriptions of the separate publishers, and comparisons between the *de alios* and the *de novos* in both countries. Each subsection ends with conclusions and a discussion.

### 6.7.2 Capabilities of *de alio* and *de novo* publishers

In the previous chapters we saw a shift from *de alio* to *de novo* publishers in the comics publishers population in the Dutch language area, which is related to an evolution of the main format for comics: from magazines to albums. Both comic-formats require different capabilities of publishers. The two propositions related to capabilities, as introduced in Section 6.2, were:

PROPOSITION 1 A *De novo publishers introduce innovations with regard to comic albums that are copied by de alio publishers.*



PROPOSITION 1 B *De novo publishers are able to adapt to changes in the album market more effectively and faster than de alio publishers.*

### 6.7.2.1 Dutch de alio: VNU

In the 1960s VNU publisher GP was inspired by Dupuis' comics publishing strategies. GP employed former Dupuis editor Middeldorp who got the task to manage and edit their comic magazines. This was one of the measures GP took to compete with other Dutch publishers of comic magazines. Middeldorp introduced album formats and series from Dupuis and Dargaud on the Dutch market, at first without approval of his superiors. In the 1970s the comics department within VNU was further professionalized, when the Oberon youth magazines and books division was founded. Separate functions were created for editors of albums and magazines, for marketing, merchandising and licensing comics. The new structure was comparable with that of the Belgian and French publishers Dupuis, Lombard and Dargaud.

Due to the close contacts with Dargaud, with whom Oberon cooperated for a long time, VNU introduced Dargaud's first author's albums. Later the partly VNU-owned publisher Big Balloon published comics for adolescents and adults, like author's albums and genre albums that were licensed from the French de novo publishers Glénat and Les Humanoïdes Associés. In addition Oberon and Big Balloon published many originally Dutch comics for the same audience, created by young, starting artists. Former Oberon employees Van den Boom and Van Wulften started their own de novo comics publishers Arboris and Espee. Van Wulften was even supported financially by VNU to start Espee, in order to explore the market possibilities for adult comics. When this market proved to be too small for VNU, they withdrew and Espee continued independently. Espee and Arboris used the same business model as the foreign de novo publishers and introduced new French and American comics and innovative Dutch artists.

If we look at the innovative capabilities of the Dutch de alio case publisher VNU as summarized above, copying innovations in general appears to be a persistent property. It was not limited to exploiting innovations from de novo publishers, but in the decades before the album era also included borrowing formulas, structures and

business models from other de alio publishers, either from the country itself or from foreign publishers. To a certain extent VNU was innovative in The Netherlands: it introduced new genres on the Dutch album market, and VNU companies Oberon and Big Balloon introduced young Dutch artists to the album market.

#### 6.7.2.2 Dutch de novo: Oog & Blik

The de novo publisher Oog & Blik (O&B) also introduced young Dutch artists to the Dutch market, and in addition produced translations of artistic comics (author's albums and graphic novels) for the Dutch market. With their own distribution company Het Raadsel they could reach the album audience. In order to reach a broader audience than just the specialized comics shops, they cooperated with literary publisher De Harmonie. This enhanced distribution in bookstores. Joost Swarte stimulated the symbolical production of artistic comics, by initiating the possibility of grants from the government, and by starting a comics festival that had a highly artistic character. Just like VNU O&B also copied its business model from another publisher, in their case the French publisher Futuropolis. In the course of its existence O&B published less Dutch artists, and more translations, out of necessity: publishing Dutch artists is expensive, and the market is small. From that perspective O&B did not behave very differently from the de alio publishers. What did make them different was their systematic attention for artistic comics, their attempt to institutionalize comics as a form of art, and the active role that co-publisher and artist Joost Swarte played in these developments.

#### 6.7.2.3 Belgian de alio: Dupuis

*Spirou* was not the first European comic magazine, but it was one of the earliest *independent* comic magazines. In that respect the de alio publisher Dupuis played an innovative role. In their competition with Lombard's *Tintin* magazine the *Spirou* artists developed a common style, later called the School of Marcinelle. After the war Dupuis was one of the earliest comics publishers who produced albums according to a fixed formula. As a reaction to the growth of the album market, a new album department was started in the 1970s.

The most radical innovation in the 1970s was the *Le Trombone Illustré* annex to *Spirou*. This was certainly a reaction to the innovations from France. However, it was not successful, because it was not suitable for the much younger audience for *Spirou* and it had to stop within a year.

A decade later Dupuis made a more fundamental change, after the acquisition by Albert Frère's Groupe Bruxelles Lambert. It became clear that the album market was more important for their survival than the magazine *Spirou*. Jean van Hamme was allowed to start new comic album collections. His most radical innovation was the *Aire Libre* collection: prestigious author's albums by a selection of the best artists. This series was a response to the de novo album publishers, but even more so it was Dupuis' way to react on the (*A Suivre*) author's albums by their de alio competitor Casterman. Dupuis went one step further than Casterman: the stories in the *Aire Libre* series were not necessarily pre-published in a magazine or newspaper. This was truly innovative for a de alio comics publisher with its roots in magazines.

Summarizing, Dupuis copied formulas of others, of de alio as well as (indirectly) of de novo publishers, but it was also innovative itself, even in the album niche that was dominated by de novo publishers.

#### 6.7.2.4 *Belgian de novo: Bries*

Bries' organizational form is already radical for a publisher, for it is a not for profit organization. Bries' main aim is to promote artists in whom the publisher believes and to make their comics available to a larger audience than just visitors of small press festivals and peer-artists. It is innovative in publishing books by experimental and artistic young creators from Flanders, The Netherlands and abroad. Nevertheless Bries' owner Ria Schulpén was also inspired by other publishers, like L'Association. Just like O&B Bries cooperates with other publishers to share risks and enhance distribution possibilities. In comparison with the Dutch de novo case organization O&B Bries has published relatively more originally Dutch language comics. In Flanders and The Netherlands grants for artistic comics have become available, and Bries and O&B profit from that. O&B is a profit company, however idealistic it might be, and this explains the differences in their publishing strategy.

### 6.7.2.5 Conclusion and discussion

In general we see that de alio as well as the de novo publishers copy products, formulas and structures from other publishers, in their own country or across national borders. Both types show the same mixture of exploitative and explorative behavior. De alios do not only copy from de novos, but also from other de alios. De novo organizations are not the only publishers who introduce innovations, but nevertheless the most radical innovations by alio publishers are reactions on de novos. From the information about the case organizations this is illustrated by the *Aire Libre* collection by Dupuis. The author's albums introduced earlier by Dargaud and Casterman are also clear examples. The album innovations from these de alio publishers would not have been there if they had not been preceded by books from artist-focused and artist-owned de novo publishers like Les Humanoïdes Associés and Futuropolis. Proposition 1 A can be confirmed.

Although in the comics niche the abstract terms 'specialist' and 'de novo' often refer to the same actual organizations, the use of these terms as synonyms is not always applicable. The de alio publisher Dupuis behaves like a de novo organization, especially since the acquisition of the comics division by Albert Frère. One could say that this caused a rebirth of Dupuis as a de novo organization. In terms of resource partitioning Dupuis has changed from a generalist into a polymorphist: it still continues to produce comics for a broad audience, and simultaneously produces innovative comics for small niches that traditionally are the domain of specialists. The dichotomy de alio / de novo does not offer a denominator for organizations that change their focus, for instance as a consequence of a merger or acquisition (one could think of something like a 'renovated de alio').

Dutch generalists reacted differently than Dupuis on the change from magazine into album logics. VNU gradually withdrew from the comics market, and in the end sold its shares in Big Balloon to the latter. The scale advantages that VNU depended on as a typical Type I organization were no longer there in the album market. VNU's successor Sanoma limited its comics publications to magazines and albums that still had scale advantages: the Disney comics.

In Belgium a comparable organization, Dupuis, changed its strategy into that of a polymorphist. Belgium is better equipped for polymorphists: it has a larger supply of home produced comics. No licenses for translations are necessary, because the francophone countries have a larger market potential for their specialist products.

The innovative capability of Dupuis was already visible when Dupuis started with *Spirou* as an independent comic magazine in the 1930s, and it was repeated half a century later when the same publisher introduced the prestigious *Aire Libre* series on the new album market.

The chance to introduce innovations successfully is bigger in Belgium than in The Netherlands. Path dependency and the proximity of France explain the difference between the behaviors of comparable organizations in Belgium and The Netherlands. Belgium played an active role in the historical developments of comics that made it one of the centers of European comics production. The majority of the comics that appeared on the Dutch market were licensed and imported. This led to a stronger comics culture in Belgium than in The Netherlands.

In the long run VNU was not able and even unwilling to adapt to the album logics. Big Balloon was a *de novo* publisher, but it was rooted in VNU. It remained too large and inflexible for the small and complex comic albums niche in The Netherlands, which caused its stopping with publishing comics completely.

Dupuis reacted quite slowly to the developments in the comics niche. Their first reaction on the French movement, in the form of *Le Trombone Illustré*, was not very effective. When a few years later the album had replaced the magazine as the main format for comics, it would still take until 1988 before Dupuis had acquired the capabilities to compete on the adult album market.

The *de novo* publishers O&B and Bries are small and therefore able to adapt quickly. However, even for them the artistic comic album niche is unpredictable, which makes their position vulnerable. Swarte created new resources, by introducing grants from the government for creators that had artistic ambitions. Bries profited from the same development in Flanders. Especially the actions of Swarte make it clear that artistic *de novo* publishers can develop capabilities to survive in the small Dutch language comic album niche. His actions were motivated by an ideal: to show that comics can be seen as art, but in practice they resulted in additional resources that are really necessary for *de novo* publishers like O&B and Bries in order to survive. With these nuances, proposition 1 B can also be confirmed.

### 6.7.3 Logics and value regimes within de alio and de novo publishers

In what ways do the logics used by de alio comics publishers and by de novo publishers differ from each other, and how does this affect the comics they produce? The basic assumption here is that there is a multi-dimensional differentiation of values: between de alio and de novo publishers, between individual and managerial values in one and the same company, and between inspired (esthetic) and market-related values. The related propositions (see Section 6.2 for their introduction) are:

PROPOSITION 2 A *De novo publishers will express more values related to esthetics and inspiration than de alio publishers, that will express more market and industrial values.*

PROPOSITION 2 B *Within de alio publishers there will be a higher variety of individual values than within de novo publishers.*

#### 6.7.3.1 Dutch de alio: VNU

From the case description (Subsection 6.3.4) it becomes clear that there was a shift at VNU from mainly market values to a mixture of market and inspired values. The inspired values were introduced by the editors of albums and magazine in the 1970s, the period that comics were in transition between magazine and album logics. The opinions of VNU managers often clashed with these editors, because for the former market and industrial values were the most important ones. However in order to reach their market objectives, they needed the knowledge and creative capabilities of the editors.

#### 6.7.3.2 Dutch de novo: Oog & Blik

In the case of O&B there is a clear dominance of inspired values, although the only way to survive was to combine these with market values.

### 6.7.3.3 *Belgian de alio: Dupuis*

At Dupuis there was a mixture of market and inspired values much earlier than at VNU. Yvan Delporte, *Spirou* editor since 1956, was actively involved in the creation of the comics in that magazine. He was an artist himself. In the 1970s he contributed to the artistic innovation *Le Trombone Illustré*, together with Franquin. His successors Van Dooren and Martens were less involved as scenarists, but they were comics fans and experts. Later editors Pinchart and Gendrot showed the same combination of market and inspired values. Gendrot had an enormous support among the artists at the Dupuis stable, as was shown during the protest action against the Média Participations managers after they had acquired Dupuis. Jean van Hamme united an interest for the creative side for comics with a sense for marketing. With the Média Participations managers, the most recent owners of Dupuis, the balance has shifted towards market logics, as became clear from the lack of attention for the artists at the time of the take-over of Dupuis.

### 6.7.3.4 *Belgian de novo: Bries*

At Bries it is clear that inspired values dominate, somewhat more than already is the case at O&B, although even in the case of Bries market values are necessary to survive on the long run.

### 6.7.3.5 *Conclusion and discussion*

In de alio as well as in de novo publishers a mixture of inspired and market/-industrial values can be recognized, but esthetic values are more important for the de novo publishers than for de alio publishers. Therefore proposition 2 A can be confirmed. But the conclusion with regard to the de alios depends on the level of analysis. On the organizational level market values dominate, but when one looks at the different layers within the organization, it is clear that at the editorial level inspired values are most important, whereas at the management level market values prevail. So within de alio publishers there is a stronger differentiation between inspired and market values than within the de novos. Thus proposition 2 B can also be confirmed.

Inspired values have become more important for *de alios* since the shift from magazine to album logics. This is related to the changes of the product itself and of its audiences. Magazines contain long running *feuilleton* stories and gags created by a relatively small number of artists who work for the same target group. The readers have changed from a rather uniform group of mainly children (magazines) to a fragmented market of children, adolescents and adults (albums). These aspects have led to a complex and dynamic market: for each target group a continuous supply of album series has to be prepared, which involves a large variety of artists. The demands of adolescents and adults are different from those of children and require more knowledge about the medium and more attention for the artistic input. The role of the artist has become more important in the album market and publishers have to deal with that.

Inspired values were less important at the editorial level of the *de alio* magazine producers than for *de novo* album publishers, but they certainly were present. At Dupuis this is shown quite early by the scenarist activities of *Spirou's* Yvan Delporte. In this respect there is a difference with the VNU magazines, where inspired editors only became part of the organization in the 1970s.

On the other hand: although at the *de novos* inspired logics dominate, they cannot survive without market values. For O&B market values are somewhat more important than for Bries.

For many editors of comics that worked for the *de alio* publishers VNU and Dupuis, Heinich's term *singularity* (in Heinich's interpretation: of traditional art; in our case: of comics) seems applicable: they devoted their whole life and career to the medium, and often had already made this choice at a young age, after they had developed a strong attachment to comics. Less surprising is that the same singularity, the same passion for the medium, was visible at the *de novo* publishers O&B and Bries.

If we compare the Dutch publishers with the Belgian ones, we see that in both organizational forms (*de alios* and *de novos*) the Belgian publishers carry out more inspired logics. This is related to the fact that most of their comics are created on behalf of the publishers, by Belgian artists. In the case of the Dutch publishers only a part of the production is originally Dutch, and the majority is imported from abroad. Choosing and translating foreign comics that have already been created



elsewhere requires less creative effort than cooperating with artists that are still in the process of creating a comic.

Although *de alios* also carry out inspired values, this choice is made by the management layer for instrumental reasons, and not for the substantial reasons of the *de novos*, who have started publishing because of their attachment to comics.

We have to keep in mind that due to methodological reasons (see Subsection 3.4.2) the *de alio* and the *de novo* case organizations have been chosen to represent the polar types market-oriented (*de alio*) versus artist-oriented (*de novo*). There are also *de novo* comics publishers who are less interested in artistic comics than O&B and Bries and far more similar to *de alios* in combining market and inspired values. One thing that most of these *de novos* have in common with the artist-oriented *de novos*, is their small size. Lombard is an exception: this is the oldest and largest still existing *de novo* comics publisher, although it is not independent anymore since it has become part of Média Participations.

#### 6.7.4 Perception and selection

##### 6.7.4.1 Introduction

One of the most radical evolutions of comics is that from mass products made for children by anonymous artists, to a very diverse medium for a fragmented market that includes artistic books in which the authenticity of the artist is the most essential property. This development took place in the album niche. *De novo* organizations like O&B and Bries were effective in creating their own resource space, by getting artistic recognition for their books, but the availability of albums produced by most *de novo* publishers is limited to comics shops. Why were *de novo* publishers more successful than *de alio* publishers in one area (getting artistic recognition) and less in the other (effective distribution of their albums)?

Wijnberg's (1995) selection system theory can help us understand how the perception of comics as a form of culture is related to the actors who select. Hsu *et al.*'s (2009) theory about the relationship between the multiple category membership of a product or genre and its audience and producers will be used to explain the changes in the perception of comics' formats.

#### 6.7.4.2 *Selection systems and the recognition of comics as art*

Artistic comics like those published by O&B and Bries are that much different in form and content from traditional (children's) comics that one could speak of a radical innovation. According to Wijnberg (1995) and Wijnberg and Gemser (2000) such innovations can lead to a change of the selection system in an organizational field. They discern three different selection systems: the market, peers and experts. Although in reality there often is a mixture between the three selection systems, usually one of them dominates. The niche of comic magazines can be seen as a market selection system: customers (the market) are the only actors who decide whether a magazine is attractive enough to survive.

This is quite different from the world of modern art, where experts (critics, art historians) decide whether an artist should be taken seriously, and whether artefacts can be classified as art. In The Netherlands and Belgium recognition by experts leads to a higher chance for an artist to get support from governments and related arts institutions. For many artists grants are a necessary condition for survival. Without these additional resources, they would be forced to look for another job, because the market is too small for their art.

Wijnberg and Gemser write that artists can play an active role in forcing a change from one selection system to another. Joost Swarte's activities show how an individual is able to do this. As a comics creator he played a leading role among Dutch underground artists, a selection system of peers. In the scene of European young comics artists he introduced a postmodern style of comics, which led to his international recognition by peer artists.

The term 'ligne claire' as a label for the drawing style of Hergé, that Swarte had invented at the occasion of an exhibition about Hergé and his influence on later generations of artists made him an expert on the domain of comics. Swarte has not only been active as a comics artist, but also as a designer and as an architect. This made it possible that he became a liaison between different art worlds, the one far more institutionalized than the other. According to Becker (1982) such figureheads are necessary for a new art world to become institutionalized. Swarte's expertise led to the legitimacy and institutionalization of artistic comics in The Netherlands, be it on a small scale, and not yet comparable with that of other visual arts. Since this recognition many comics published by O&B and other de novo publishers are co-financed by the Dutch art foundation FBKVB.

An involvement comparable with that of Swarte would not have been imaginable for a *de alio* publisher. But then again for *de alios* it is not necessary: their whole existence is based on market selection. For Swarte and for O&B recognition of artistic comics by art experts was a *conditio sine qua non*.

#### 6.7.4.3 *Producers, audiences and the recognition of comic albums as books*

Hsu *et al.* (2009) explain how the perception of audiences and producers of products that belong to multiple categories is related to their lack of success. The assumption is that organizations which produce such ‘fuzzy’ products are less successful than organizations that produce single category products.

Comics can be perceived as a multiple category product in several ways. The first one is that the medium itself is a combination of two communication systems: text and images. The second one is related to the formats that have been used to publish comics: magazines and albums. The albums were often perceived as magazines by audiences who decided whether they could be successful: distributors, consumers and the producers (publishers) themselves. This was caused by the fact that during a long time most *de alio* publishers were originally producers of periodicals: magazines and newspapers. *De alio* publishers used many of the same characteristics of magazines for their albums, used as they were to scale advantages and the use of industrial formulas. Their album series had the same size, the same limited number of pages, a relatively low price, and a production in series with numbered installments. New installments appeared regularly, although less often than the average magazine.

According to Hsu *et al.* publishers of comic albums should be less successful than other publishers, because of this hybridism. However, some publishers of comics have been extremely successful, certainly not less so than publishers of fiction. Sales of albums played an important role in this success. But if we compare publishers within the comics niche with each other, we see that in general it appears to be more difficult for *de novo* publishers to survive or to prosper, than for *de alio* publishers.

An explanation is that *de novo* publishers treat comic albums as books. They address their own distribution channel and audience: specialized comics shops and

comics fans. They do this out of necessity, for they are not able to get their products in kiosks and bookstores. Comics shops were often started by comics fans with a strongly individualist mentality, and with no education in the area of book selling. The comics shops hardly institutionalized, in contrast with the book and magazine world. This led to an isolated position of *de novo* publishers and comics shops. The majority of the supply of comic albums is hardly visible for the general audience that does not visit comics shops. The only album series that are still produced by *de alio* publishers (in The Netherlands and Flanders mainly Sanoma and Standaard) for a large, general audience are still marketed like magazines. The image that this general audience has of comic albums is therefore still that of a magazine, and this image was created by the *de alio* magazine publishers.

For a long time *de novo* publishers, comics shops and visitors of comics shops were the only actors who perceived comic albums as a single category product. So within this closed circuit *de novo* publishers could be successful. But this is a small market, at least in The Netherlands and Flanders, and this constrains the size and prosperity of the *de novo* publishers.

In the last decade (since 2000) the perception of comic albums has started to change. The success of literary and artistic comic albums comics that were marketed with the label ‘graphic novel’, led to a second wave of *de alio* publishers: book publishers (of literature or other fiction genres). Book publishers are always looking for new niches and for new genres to spread their risks. They discovered the success of graphic novels produced by book publishers in the United States and decided that this new medium could be attractive for them. This new generation of *de alios* uses regular bookstores as its main distribution channel. Before them the only book publishers in the Dutch language area who produced comics for bookstores on a regular basis were De Bezige Bij, mainly with Marten Toonder books, and De Harmonie, with cartoon compilations and with comic albums. Because of the joint ventures of De Harmonie with O&B, these publishers were two of the very few *de novos* that also had access to bookshops. O&B’s recent acquisition by De Bezige Bij will ensure that their titles will stay available in bookshops.

The involvement of large *de alio* magazine publishers in the production of comic albums led to a perception of these albums as products that belong to multiple categories, and the *de novo* publishers lacked power among relevant audiences to change this perception. The classification of the format of the comic album as a book, instead of a fuzzy mixture of a magazine and a book, was only possible after

book publishers (a new generation of de alio book publishers in the comics niche) became involved in the production and distribution of comic albums labeled and promoted as graphic novels.

### **6.7.5 Societal effect**

#### **6.7.5.1 Introduction**

There are differences and similarities between the evolutions of the capabilities and value regimes of de alio and de novo publishers, as has become clear from the previous parts of the case analysis. The final dimension added to these evolutions is that of the country in which the publishers are active. It is assumed here that each country has its own societal identity, formed by historical interrelations between national institutions, and that this leads to different outcomes of comparable changes. Even the neighboring countries The Netherlands and Belgium have different societal identities, thus it can be expected that the evolutions of comics and their producers also took a different turn in each country. Although none of the four case organizations is originally French (Dupuis has become partially French after its acquisition by Média Participations, but it was founded in Belgium), France will also be included in the analyses that follow, because of the many links between comics producers in The Netherlands, Belgium and France.

The propositions (introduced in Section 6.2) are related to two topics: the predicted role of the state (as a national institution), and the impact of institutional distance between the three countries on foreign direct investment.

The concepts used to explore the propositions are based on formal institutions. There are also informal societal institutions that are less easy to operationalize, but that can have an effect on the different evolutions in The Netherlands and Belgium. At the end of this subsection attention will be paid to these institutions.

### 6.7.5.2 *Role of the state I: support for comics*

PROPOSITION 3 A *Comics will be supported financially by the government earlier and more substantially in Belgium and France than in The Netherlands.*

In the case descriptions about O&B we read that after Swarte's initiative grants for innovative comics artists were introduced in The Netherlands in 1998. Bries also received subsidies from The Netherlands for the publication of the *Eiland* magazine in 2000, because it was created by Dutch artists. Later Bries would also receive support from the Flemish government, but the Dutch support was earlier. The Flemish Funds for Literature supports comics artists since 2000. Two years later a comparable measure was taken by the Wallonian government, after introduction of La commission d'aide à la bande dessinée de creation (Challe and Dujardin, 2010, pp. 9-10). In France support for comics artists was already possible since 1984 (2010, p. 10). Francophone publishers in Belgium like Dupuis also profited from this support (some artists who wrote books in the *Aire Libre* collection were supported), because many of their artists were French.

### 6.7.5.3 *Conclusion and discussion*

The French government was earlier than The Netherlands with support for comics artists, but other than could be expected on this specific area The Netherlands were sooner active than Belgium. Moreover the support for Dutch artists is more substantial in The Netherlands than in Belgium (Lefèvre and Di Salvia, 2010 and Venema, 2005); the Dutch grants are higher. Our first proposition is rejected.

The proposition was based theoretically on the institutional feature strength of the state in Hotho's (2009) typology. The Netherlands score 'low' on this feature, whereas Belgium and France score 'considerable' and 'high'. The most relevant indicator (of the two) for this feature was the extent to which the government uses subsidies to promote competition. However, this indicator concerns subsidies in general. If one takes subsidies on the arts apart, The Netherlands have played a rather active role that certainly can be called 'considerable'.

Since the 1990s popular culture has been integrated in the Dutch arts policy (De Vries and Julien, 1998). Comics were in fact one of the last forms of popular culture that did not get attention from the government yet. Swarte's initiative sped up developments. His action was based on the support that comics artists already received in France, which had led to a growing supply of translations from French artistic comic books in The Netherlands. Swarte convinced the government that this provided a threat for young Dutch artists. In that respect the subsidies certainly also had the function to promote competition with comics artists from abroad. Flanders followed, probably influenced by the Dutch policy, and after that Wallonia in its turn could not leave their artists behind empty handed. This appears to be an example of cross-border institutional isomorphism on the area of cultural policy.

If we take the important role of Belgium in the development of European comics into account, it remains surprising that it took longer for Belgium than for The Netherlands to support innovative comics artists. It has to be said that the francophone Belgian institutions had financed other comics related activities earlier than The Netherlands, like the comics museum in Brussels, which was opened in 1989. However, during a long time this museum received only ten per cent of its running costs from the government (Miller, 2007, p. 43), far less than museums for visual arts receive on average. In The Netherlands a comparable museum opened its doors (in Groningen) much later: in 2004. Belgium also started earlier with educational programs for comics artists. The first one already started in 1968 (a francophone program), and was followed by a Dutch language program in Brussels in 1998 (Lefèvre and Di Salvia, 2010). The Netherlands had to wait for eleven more years before a specialized program for comics artists was started in Zwolle.

Proposition 3 A was based on one indicator for the institutional feature 'the strength of the state': the extent to which government subsidies promote competition. However, in this case, only one specific kind of subsidies is relevant: subsidies on art. On this area The Netherlands are less reticent with subsidies than on other areas. This contextual information reveals the risks of applying scores on general features to a specific industry.

#### 6.7.5.4 *Role of the state II: strength of market regulation*

PROPOSITION 3 B *De novo comics publishers will have an easier access to the market in The Netherlands than in Belgium and France.*

If we compare both de novo publishers, O&B and Bries, with regard to their effectiveness in entering the Dutch and Belgian market, we see that both have access to the market primarily via comics shops. Both firms started as a distributor of artistic and small press comics before they published comics, and by doing so had already created access to the market. In The Netherlands and Belgium comics shops and specialized distributors for these shops came into life as soon as the album market was big enough.

For both publishers it was more problematic to reach a broader audience. One of the strategies to improve this was to cooperate with other actors that did have access to bookstores. Since its foundation O&B had co-productions with De Harmonie. This enabled them to sell their comics in book shops as well as in comics shops. When the comics shops niche became too small for O&B for survival, they looked for a new partner and agreed with the acquisition by De Bezige Bij. Such a large literary publisher appeared to be the only way to get access to the regular book market.

In general Belgium offers more distribution options for de novo comics publishers than The Netherlands. Belgian kiosks and warehouses like (the originally French) FNAC offer a large supply of comic albums. In The Netherlands kiosks limit their comics supply to a small number of bestsellers. Shops like FNAC do not exist in The Netherlands. However, for artistic comics like the ones Bries produces, there are not so many distribution opportunities, even in Belgium: the niche for experimental comics is small and not interesting enough for large shops. This is also the reason why Bries published many of their books in English, for the international market.

#### 6.7.5.5 *Conclusion and discussion*

In general de novo comics publishers in Belgium have an easier access to the market than in The Netherlands. The proposition has to be rejected.



For avant-garde and artist-oriented de novo publishers like O&B and Bries the access to the market is limited to specialized comics shops in both countries. Only their co-productions with literary book publishers (a.o. with De Harmonie) are distributed more widely. The main reason for this limited distribution is that the sub-niche for experimental comics is very small in both countries.

If we relate the rejection of the proposition to the extent to which the state has regulated the market we have to be cautious. According to the score for The Netherlands (and for other countries that belong to Hotho's first cluster) the strength of the market regulation is 'low'. On the area of books however, the Dutch government has taken protective measures, like fixed prices for books. This is done to sustain the supply of a large variety of books, and to protect smaller books shops that are not able to sell books for giveaway prices. Books are seen as cultural artefacts, and not merely as objects for trade. Such measures are not known in Belgium, although that country scores 'considerable' on the same indicator.

On this specific topic The Netherlands would actually score higher than Belgium on the institutional indicator market regulation. In addition active trade organizations of books and magazine producers, distributors and retailers have led to a highly institutionalized sector in The Netherlands, certainly not less than in Belgium. If this had been the point of departure for our proposition, it would have been formulated in the opposite direction: "de novo comics publishers will have an easier access to the market in Belgium than in The Netherlands", and this proposition would be confirmed.

Just as was discussed at the previous proposition, we have to proceed with caution if we apply findings on a general level to a single industry. Such indicators can be useful for research on a very high aggregation level, but they are too crude for industry-specific predictions.

#### **6.7.5.6 Institutional distance**

**PROPOSITION 3 C** *Belgian comics publishers will have more foreign direct investments in France than in The Netherlands.*

Dupuis had a subsidiary in The Netherlands as well as in France, but the subsidiary in France was founded earlier, already in the 1930s, for the general magazines that Dupuis published, not specifically for their comic magazine *Spirou*. Of course it also became important for the diffusion of *Spirou* in France. The Dutch subsidiary opened later: in the early 1950s. The Dutch office was mainly meant for distribution purposes of the Dutch version of *Spirou: Robbedoes*. The last Dutch Dupuis office closed its doors in 1991, after Dupuis management had decided that the Dutch album market was too small for such a subsidiary. Since then, the Dutch language Dupuis albums were distributed by other firms, and occasionally licensed to Dutch publishers.

The biggest foreign direct investment where one of the case organizations was involved was the acquisition of Dupuis by the French Média Participations in 2004. It was a logical next phase in the extension of Média Participations, after it had acquired Lombard and Dargaud. These two publishers had already been working together since the 1940s, when Lombard produced a French market version of *Tintin* magazine. Before its acquisition by Média Participations, Lombard did not have any subsidiaries in its neighboring countries: in France Lombard worked together with Dargaud in a long lasting joint-venture: Lombard made Belgian versions of Dargaud albums and Dargaud produced French market versions of the Lombard albums. In The Netherlands Lombard licensed its albums to Vanderhout and subsequently Helmond. In contrast to the Dargaud-Lombard joint venture this was a one-way traffic: Vanderhout and Helmond did not produce originally Dutch comics that could be licensed to Lombard.

The de novo publisher Bries is of course far too small to have foreign direct investments, but it has been cooperating with foreign firms. Bries had joint productions with Wallonian, Dutch and French publishers.

#### **6.7.5.7 Conclusion and discussion**

From the information above it becomes clear that we cannot confirm the proposition. Dupuis had a subsidiary in The Netherlands as well as in France. The largest international acquisitions, the ones initiated by Média Participations, were a completely Belgian-French operation, mainly because in The Netherlands there was no

comics publisher with a supply of comics comparable to that of the Belgian publishers Dupuis and Lombard.

Although VNU was a multinational, it had no subsidiaries in Belgium or France for its comics productions. The main reason was that VNU had too little Dutch comics to offer to other countries, and neither had the ambition to do so. Most of VNU's comics were imported. Only during a short period, when Oberon had become the VNU division for comics, there was an active policy within Oberon to sell Dutch comics to other countries. Sometimes they succeeded, but the French translations of Dutch comics were much smaller in numbers than the other way around. VNU licensed comics from Belgian publishers, but even more from French publishers, especially Dargaud. VNU had a joint venture with Dargaud that lasted from the 1970s until the early 1980s. At that time Dargaud started a subsidiary in Brussels for the production and distribution of albums in the whole Benelux, and this was more effective for them than the joint-venture with VNU.

O&B has close contacts with French publishers and licensed albums from a number of French *de novo* publishers. Only occasionally did O&B publish translated comics originally produced by Belgian publishers (like Casterman and Dupuis), mainly because the Belgian publishers published their own Dutch language versions of these albums.

Institutional distance only played a modest role in the differences between international strategies of the comics publishers from The Netherlands, Belgium and France. Other factors, like geographic and cultural proximity (Wallonia and France sharing the same language), and market size provide more plausible explanations.

Hotho (2009) had already concluded that institutional distance was less important than other factors for the explanation of differences in the foreign direct investment strategy. In our case we have to keep in mind that the institutional distances between the three countries are not extremely large. The distance from The Netherlands to Belgium was 0.86, and to France 1.57, but the maximum distance from The Netherlands to other countries was 3.45 (Hotho, 2009, p. 133). For Belgium (distance to France 0.66) the maximum distance to other countries was 2.39, and for France it was 3.18 (see Table 6.5). If the differences had been more distinct, the impact of institutional distance might also have been stronger.

**Table 6.5 Institutional distances and maximum distance of The Netherlands, Belgium and France**

distance to	The Netherlands	Belgium	France
The Netherlands		0.86	1.57
Belgium	0.86		0.66
France	1.57	0.66	
maximum distance to other countries	3.45	2.39	3.18

source: Hotho, 2009

Hotho is not the only one who uses a measure for institutional distance. Dikova and Van Witteloostuijn (2007) developed the institutional advancement measure that they tested in a specific context: entry modes of organizations from developed markets in transition economies. In their study the institutional distances are much larger, and thus can have more explanatory power than in our case.

#### **6.7.5.8 The impact of specific government measures**

Above we already saw that Dutch measures to support art and to support books explained why propositions led to different conclusions than could be expected on the basis of general theory (i.e. the national business system clusters according to Hotho). This limits the practical usability of Hotho's clusters and of Whitley's typology, if applied to a separate industry. However, it does not change the assumption that governmental measures have influenced the directions of evolutions in comics publishing in Belgium and The Netherlands. There are (at least) two other measures, one from France and one from The Netherlands that also contributed to this.

The French Youth Law from 1949 (see the Dupuis case) was a protectionist measure from the French government that provided a threat as well as a challenge for the Belgian comics publishers. Although censorship was a negative consequence of this law, the advantages for the Belgian comics publishers were bigger: after the war there was a huge demand for comics, but due to the law the supply of Amer-

ican comics diminished, and French comics publishers had not enough supply yet to fulfill the demand. Dupuis (but also Lombard and Casterman) jumped into this hole in the market, and this was the start of a period of prosperity for the Belgian comics industry.

The French Youth Law was based on the assumption that (American) comics were harmful for children and adolescents, and that these groups and society as a whole should be protected. Many other western countries had a comparable negative vision on comics in the 1940s and 1950s (see Chapter 4), the age of rebuilding society after the Second World War. The Netherlands were no exception: Dutch comics production was constrained in 1948, after the Dutch Minister of Education had published a letter addressed to all schools and libraries in which he condemned comics (especially one genre: *the beeldromans*) (Sanders, 1990, 1992). As a consequence many comics producers withdrew from the market. The VNU publishing companies took the necessary measures to convince consumers of the fact that their comics (a.o. *Donald Duck* magazine) were quite innocent and even had an educational value.

The difference with France was that the Dutch government was not against American comics, but mainly against the originally Dutch, quite sensational beeldromans. This made it possible for the Dutch magazine *Donald Duck* to become very successful in spite of the negative attitude towards comics (in contrast with France, where the popular French Disney magazine *Le Journal de Mickey* disappeared during a long time as a consequence of the Youth Law). If a temporary prohibition of Donald Duck would have occurred, this almost certainly would have opened market possibilities for Dutch artists like those from the Toonder studios. Since this was not the case, the Toonder studios became too small to compete with the large supply of children's comics from abroad, and gradually imported comics outnumbered the originally Dutch comics production (see Chapter 4).

#### **6.7.5.9 Informal societal institutions: impact on publishers and on artists**

The concepts used in this subsection are based on formal institutions on a country-level. In addition there are informal institutions that influence the behavior of publishers and comics artists, but these are more difficult to operationalize. They

can be related to the values of publishers already described in Subsection 6.7.3, but also to cultural identity and cultural proximity.

Jean and Charles Dupuis were convinced Catholics and this was the basis of their ideal to offer a Francophone alternative to American popular culture. This led to Dupuis' preference for Belgian (and French) artists, who were able to create comics that fitted their principles, instead of importing foreign comics. The Dupuis family felt that Wallonia was culturally close to France and realized that their magazines were also economically dependent on the French market. This even led to removing specific Belgian elements from the comics in Spirou and instead giving the comics a French or universal context. These acts can partly be explained by economical factors, but according to Baetens (2008a) it is also something that exemplifies the Belgian cultural identity.

Baetens discusses the differences and similarities between Flemish and Walloon comics, and relates these to Belgian culture.<sup>1</sup> According to Baetens there is one thing that all Belgians do share: ironically, this is their refusal of a common Belgian culture. Flemish and Walloon comics each express this attitude in different ways: Flemish comics artists reject the national culture and express this by using a particular political and cultural idiom with right-wing anarchistic tendencies. This can especially be recognized in the Golden Age of the Flemish comics: the period 1945-1965. In this period many Flemish comics (including *Suske & Wiske*) were written in Flemish dialects of Dutch, which expressed the antipathy to the official Dutch language. Walloon comics artists use another strategy: they deny a Belgian identity. This 'De-Belgicisation' can include the removal of typical Belgian elements from comics (Baetens, 2008a, p. 115). It also becomes apparent in the best-known Belgian comic, *Tintin*:

*During the first half of his adventures, not only is Tintin a globetrotter (which is an elegant way to skip Belgium), but the references to local, Belgian culture rapidly become very rare (at least at surface level), and no Belgian reader will be disturbed by this void.*

(Baetens, 2008a, p. 116)

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<sup>1</sup> Jan Baetens is a Belgian scholar specialized in cultural studies. Although originally Flemish he has strong ties with the Walloon, francophone culture.

Baetens (2008b) refers to Belgian culture as ‘minor culture’, a culture ‘characterized by a critical reworking of a *dominant* culture by a *dominated* minority’ (2008b, p. 99).<sup>1</sup> A minor culture is something else than just a ‘small’ culture: the one of The Netherlands. This property of Belgium explains why the country has become so active on the area of comics: it was one of the few artistic media that ‘was left relatively untouched by the dominant culture’ (Baetens, 2008b, p. 100). Related media like that of the novel and the essay were already controlled by the French and the Dutch.

This difference between belonging to a minor culture versus belonging to a small culture can partly explain why, in contrast to the Belgian publishers, the Dutch VNU had no problems with importing and translating comics from other countries (a.o. Belgium, France, the UK, the USA). In their publishing strategy VNU combined those foreign comics with originally Dutch comics. There are other explanations as well: the market for VNU comics produced by Dutch artists is limited to an area with a much smaller potential than that of Dupuis. However, Standaard and other Flemish newspaper publishers also had to deal with the limited market size for Dutch language comics, and they did develop a strong originally Flemish comics tradition with the characteristics described above by Baetens (2008a).

Comparable differences between Belgium and The Netherlands can be seen if we look at the *de novo* case publishers O&B and Bries. After an internationally oriented entry period, the Flemish Bries became less focused on international comics and more on originally Dutch language comics in the 2000s. Bries became one of the biggest promoters of new Flemish talents with its publication of the two *Hic Sunt Leones* anthologies. The publishing list of the Dutch O&B on the other hand shows an increase of translated comics and a decrease of originally Dutch comics since the second half of the 1990s. Whereas Bries kept its ideals of introducing artistic, alternative comics, O&B mixed innovative comics with translations of (French and American) comics by artists that had already become popular, mainly for pragmatic reasons.

In comparison with the Belgian publishers it appears that the Dutch are more pragmatic, more inclined to look for attractive comics from other countries, and less

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<sup>1</sup> Baetens borrowed the term ‘minor culture’ from Deleuze and Guattari’s study of Kafka (Deleuze and Guattari, 1986), in which they introduce the term ‘minor literature’ when they refer to Kafka’s use of the German language as a Jew in Prague.

idealistic with regard to publishing originally Dutch comics. This has led to a large variety of comics in The Netherlands, but also to a relatively small supply of originally Dutch comics.

Informal institutions can also be related to conventions among *comics* artists. Most comics artists from older generations (born before 1940) saw themselves as craftsmen, working on behalf of an industry, whereas many younger artists (born after the war) saw themselves as artists, who wanted to create comics according to their own wishes. The change of mentality manifested itself in the 1960s, in the underground or counterculture period. In the early 1970s this self-awareness led to the actions of the French artists who left Dargaud's *Pilote* magazine to begin their own publishing companies.

The Dutch artists who worked for VNU and the Belgian artists who worked for Dupuis were influenced by their French colleagues. As a result the Dutch artists started their own, alternative comic magazine *De Vrije Balloen* in 1975. Some older artists and editors participated in the quest for more artistic liberty. Franquin, former *Spirou* editor Delporte and other Dupuis artists published the notorious *Le Trombone Illustré* annex to *Spirou* in 1977, with the assistance of French artists. In The Netherlands *De Vrije Balloen* published the *Idées Noires* comics that Franquin had created for *Le Trombone*. Franquin's gags fitted in the format of *De Vrije Balloen*: adult comics drawn by artists who had published before for a young audience in a 'traditional' comic magazine, and now could let go of all constraints. With regard to this change in attitude towards the profession of being a comics artist, there are not so many differences between the three countries.

Artists influence each other by their drawing style, as was already illustrated by the influence of Hergé on Joost Swarte and many other European artists, and also by the diffusion of Swarte's interpretation of Hergé's *clear line* on artists of his generation. Dutch, Belgian and French artists were on their turn influenced by American artists that introduced different drawing and narrative techniques.

From the four cases it appears that the main artistic two-way traffic was between France and Wallonia, to a far less extent between Wallonia and Flanders or between Flanders and The Netherlands, and even less between Flanders and France or between The Netherlands and France. Swarte's impact in the francophone countries was an exception, and was mainly caused by his innovative use of the style of a Belgian artist who was very popular in Belgium and France: Hergé. A small group



of Flemish artists, among whom was Morris, the creator of *Lucky Luke*, in an early stage of their career chose to work for Walloon publishers and magazines. Their work was translated from French into Dutch instead of the other way around.

Other Dutch and Flemish artists hardly had any influence in the francophone area. There was mainly a one-way traffic from Wallonia and France to Flanders and The Netherlands. The strong position of francophone comics, as a consequence of the historical events in France and Wallonia (path dependence) and their larger market size, have led to more favorable circumstances on the international market for French and Walloon publishers and artists than for their Dutch and Flemish counterparts.

## 6.8 CONCLUSIONS

The extensive case studies of four comics publishers - two from The Netherlands and two from Belgium - showed how each publisher had its own reasons for entering the comics niche, and how each also evolved in a different way. Nevertheless an analysis of these cases showed that there were similarities between the two *de alios* and between the two *de novos*. A third comparison, between the publishers from one land with those from the other, revealed characteristics of each country. By means of propositions based on concepts from the research framework the cases were analyzed. Additional literature was used to explore further if the findings contradicted expectations.

Although there were differences between *de alio* and *de novo* publishers, there were also similarities, more than were expected. In The Netherlands and in Belgium *de novo* publishers were not only exploring, i.e. publishing innovating comics, but also exploiting, i.e. copying formulas for comics already introduced by predecessors - *de alio* or *de novo*. The other way around was also seen: the *de alio* publishers have not only been exploiting, but also exploring. *De novos* are more apt to the small and dynamic album market than *de alio* organizations. However: *de alio* organizations can change drastically during their existence, and after this change can be just as fit for a dynamic environment as a *de novo* organization. In terms of resource partitioning theory such organizations have changed from a generalist into a specialist or polymorphist. The dichotomy *de alio* / *de novo* does not offer a category for organizations with such a second life.

In both countries, and for both types of publishers, esthetic and inspired values have become of increasing importance. This is caused by the evolution of the comic album itself and by the simultaneous emancipation of both artists and audiences. Although the *de novo* publishers carry out more inspired values than the *de alios*, the latter have also been forced to work according to these logics - at least at the editorial level - due to the evolutions just mentioned. Editors at both types of publishers in both countries show a strong attachment to comics that can be labeled with Heinich's term *singularity*.

Relatively recently artistic comics have become institutionalized in The Netherlands and Belgium, and since then are supported by the governments in both countries. For artist-oriented *de novo* publishers this support was necessary; otherwise they would not have been able to survive. The active role of *de novo* publishers contributed to the recognition of comics as a form of art, but the same publishers were too small to change the perception among a general audience and among book distributors of the comic album as a magazine, instead of as a book. This limited an optimal distribution of the comic albums produced by the *de novos*. Only a new generation of *de alios* - book publishers who publish graphic novels - has been able to change this, because they are recognized by the bookstores, and most *de novos* were not.

The differences between the evolutions of comics in The Netherlands and Belgium are consequences of a societal effect. Concepts based on general societal features of both countries were less useful to explain these differences than specific institutions, both formal and informal. Propositions based on an expected reticent role of the Dutch government with regard to support to and regulation of the market were rejected, because The Netherlands are more supportive on the specific areas of art and culture than on other areas. The difference between foreign direct investment of Belgium into The Netherlands and France was smaller than expected, and could only be explained by the fact that the institutional distances between the three countries are too small to affect foreign direct investment.

The poor predictable power of country clusters and business systems based on general societal features, if applied to a single industry and a small number of neighboring countries, also reveals that these concepts are mainly useful on a very high aggregation level: a comparison including all industries between large numbers of countries. In case of a research into just one industry in a small number of

countries, a more interpretive approach should be taken, that pays attention to context-specific factors.

The French Youth Law is such a factor. It has influenced the dynamics in the comics field enormously, because (indirectly) it stimulated the quantity and the quality of the comics supply from Walloon publishers. Apart from this institutional factor geographic and cultural factors have had the largest impact on the different directions of the evolutions of comics and its publishers in The Netherlands and Belgium.

The cultural identity of Belgium was not caught in general typologies, but this identity at least partly determined its active role in the evolution of comics. Belgium is a 'minor culture': a culture that is (or has been for a longer time) dependent on other, 'major' cultures and that reacts critically on these cultures. One of the ways in which a minor culture reacts is profiling itself on areas that are not (yet) dominated by the major culture. Comics were such an area. Flanders and Wallonia each have filled in this niche in a different way: by respectively rejecting and denying a common, Belgian culture. The fact that both populations within Belgium developed a strong comics culture, with a large native production, is one of the things they do have in common, apart from and in spite of a shared negative attitude towards a common Belgian identity.

In Wallonia this led to an enormous supply of originally francophone comics, where it is hard to discern between comics originally from France or from Belgium, but where comics from non-francophone countries (including Flanders) are hardly known. The geographic factor that Wallonia is the neighbor of a country with a much larger market potential than Belgium itself stimulated the prosperity of the Walloon comics producers. Wallonia, in its denial of a Belgian identity, is more directed towards the French culture than the Flemish culture is directed towards the Dutch culture.

In Flanders the same 'minor culture'-mentality led to a large market for originally Flemish comics, but most of these (with the exception of *Suske & Wiske*) are hardly known abroad.

The Netherlands have a small culture, but not a minor one in the sense mentioned above. The Dutch are more pragmatic, more tended towards compromise, and less idealistic with regard to publishing originally Dutch comics than their Flemish and

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Walloon counter pendants. They have no problems with importing and translating comics from other countries, if this is cheaper than publishing originally Dutch comics. This has led to a large variety of comics produced by Dutch publishers, but also to a relatively small supply of originally Dutch comics. Most influential European comics artists are from Wallonia and France. Dutch and Flemish artists were important for the evolution of comics in their own country, but to far less extent across the borders.

In this chapter different evolutions of comics and their producers have been mentioned, just as in the Chapters 4 and 5. In the next, concluding chapter the findings from the different chapters will be linked with each other. I will look at the evolutions critically, and discuss whether and to what extent these are co-evolutions.



## **CHAPTER 7**

### **EVOLUTIONS AND CO-EVOLUTIONS**

#### **7.1 INTRODUCTION**

In the previous chapters changes in the comics niche were related to individual publishers (the cases in Chapter 6) and the whole population (Chapters 4 and 5), but also to comics themselves, comics artists and environmental factors. In this final chapter the data from the empirical chapters will be combined. In the next section the differences and similarities between evolutions at the macro- and the micro-level in The Netherlands and Belgium will be addressed, as well as the distinction between evolutions and co-evolutions. Subsequently the conclusions in Section 7.3 answer the main question of this research. After that a discussion follows of the theoretical implications of the findings. The final part of Section 7.3 addresses limitations of the research and provides directions for future research.

#### **7.2 EVOLUTIONS AND CO-EVOLUTIONS**

##### **7.2.1 Macro-level**

Chapter 4 and Chapter 5 provided us with insights into the evolutions of comics publishers and the relationships with developments of comics as a medium and of comics artists. The analyses in Chapter 5 focused on publishers of comic albums. These showed that before the Second World War the number of comic album publishers was very small. This changed after 1945. In the post-war period of the analysis (1945-1994) the incumbents attracted other publishers (see the entry analysis in Section 5.3), because they gave the comics niche more legitimacy: comics were a product suitable for industrial and trade purposes. But in the first decades after the war comics were stigmatized by governments and other institutions, in The Netherlands, and also in France and other European countries and in the United States. This led to a standstill of the niche in The Netherlands in the 1950s and

1960s, but in Belgium these measures created opportunities on the French market for Walloon publishers.

Especially since the second half of the 1960s the number of publishers in the comics niche grew enormously. This growth is related to the rise of youth culture, and the gradual acceptance of popular culture among a wider audience. This growth led to a variety in the population of publishers. However, the majority of these publishers remained in the niche only quite briefly and published a very small number of books. The identity of the niche was mainly formed by a relatively small number of very productive publishers, who remained active for a longer time. According to Industrial Organization theory, if the level of concentration in a market (expressed by C4) is high, and if the resources for generalists are homogeneous, this can create opportunities for smaller organizations that specialize in the spaces that are too small and too diverse for generalists. This already was the case in the late 1960s and 1970s, but the effect of C4 on new entrants became even bigger in the 1980s.

The fact that *de novo* organizations, who specialize in comic albums, formed the majority in the population after 1980 shows that these publishers were better able to fulfill the role of (sub-)niche player than smaller *de alio* publishers. This led to a dual market structure (Van Witteloostuijn and Boone, 2006). A small number of generalists published a limited number of album series for a general audience on a large scale, and a large number of small *de novo* publishers produced a variety of comics for sub-niches among the audience, often on a small scale. The resources for the specialists were heterogeneous, which enhanced their chances of survival.

In the 1990s and the early 2000s, the remaining generalists have limited their supply even further to only the most popular titles. This concerns the small number of comics series that still can be produced by organizations that thrive on scale advantages. On the other side of the publishers' spectrum many small specialists have increased the diversity of their title supply. The level of concentration decreased and at the same time the total number of publishers increased further. The structure of the supply-side of comics has been changing from a dual market structure into a fragmented structure.

Due to the larger popularity of comics in Belgium, and the larger market potential especially for Walloon comics publishers (which export their comics successfully to France and to many non-francophone countries, among others to Flanders and

The Netherlands), firms from that country have a larger chance of survival than Dutch comics publishers. Evidence for this assumption was provided by the exit analysis in Section 5.4.

For all publishers the chance to survive also depends on the period in which they are founded: in years with a high density (many entries, smaller numbers of exits), the chances to survive as a comics publisher are smaller than in periods with a lower density. This density delay is caused by the limited resources of the comics niche in the Low Countries. These resources can be related to a limit in the demand for comics (market size), but also to the supply of comics: for instance the number of artists that is able to create those comics that are in demand.

Figure 5.6 in Chapter 5 shows that there are three periods with high density rates: the first one immediately after the end of the Second World War, when there was a high demand for entertainment, and when there were not so many substitute products yet. The second peak in density starts at the end of the 1960s, when the conventional formula of generalist publishers to publish comics that had been pre-published in magazines, was used more actively than the decade before, and at the same time was supplemented by new publishers that specialized in albums for a more adult audience. The third peak was a decade later: at that time there was an infrastructure of specialized comics shops in all larger towns, and at the same time kiosks were still willing to sell comic albums. This again led to new entrants, mainly *de novo* publishers. Publishers founded in these peak-periods had to deal with a more fierce competition than publishers that were founded earlier or later.

Some of the longest living publishers have started publishing comics in periods when comics were still hardly known, or in a period when new kinds of comics (like graphic novels and artistic comics) just started to become popular, and this gave them the early mover advantage. The case publishers VNU and Dupuis were among these long-living early movers: they already started publishing comic magazines and albums before the Second World War.

The exit analysis provides a simple but important advice for publishers who want to increase their chance of survival: publish more. The analysis showed that survival chances for publishers are significantly related to the numbers of series and albums produced. The case studies confirm that longer living publishers have invested in artists from their own country, who create comics especially for them, or



in acquiring the rights for translations of already published comics. In both cases it means that the publisher stretches its network.

Dutch publishers have invested more in translated comics, in combination with the production of a smaller number of originally Dutch comics, whereas Belgian publishers have focused more on originally Flemish or French language comics (from Wallonia and from France). In the comics niche there has always been more cross-border cooperation between Walloon and French publishers and artists than was the case between The Netherlands and Flanders. Exchanges between France and Wallonia on the one hand, and Flanders and The Netherlands on the other hand, mainly were a one way traffic: francophone comics were exported and translated into Dutch, but apart from a few exceptions there was no export from the Dutch language countries to France and Wallonia.

The comics industry has developed from a niche mainly dependent on *de alio* organizations (publishers also active in other niches) to a branch where the population is formed by a mixture of *de alio* and *de novo* organizations. Only since the 1980s are the *de novo* organizations the majority in this population, and also the most productive ones. Most of the *de alio* comics publishers have their origin in newspaper, book or magazine publishing. Apart from the *de alio* publishers that have their roots in publishing, there have always been numerous *de alio* organizations in the comics niche that have a totally other background than publishing: they only publish comics for promotional purposes. In this research they have been labeled as *hit & run* publishers.

The fact that *de alio* organizations have a large share in the comics industries niche had an impact on its identity. Comics are perceived as a derived, secondary product by the *de alio* publishers themselves, and also by other organizations in the same value chain, like distributors of books and magazines.

The presence of the *hit & run* comics publishers can easily be explained by the popularity of comics characters among a broad audience, which made them very suitable for advertising campaigns and promotional actions. Although the licensing of comics characters to *hit & run* organizations has always been an important source of income for comics publishers and artists, this usage also had a downside: it contributed to the image of comics as an industrial, commercial medium, without any intrinsic artistic or cultural value. This made it difficult for *de novo* publishers to establish themselves among a wider audience than just the comics fans.

The status of comics differs between The Netherlands and Belgium, and within Belgium between Wallonia and Flanders. In Wallonia the important historical contribution that Belgian artists have made to comics that have become internationally successes, has led to more legitimacy of comics. They are being seen as a part of the Belgian cultural heritage, and governmental institutions have acknowledged this by subsidizing comics-related activities. Nevertheless, governmental support for individual artists that experiment with the medium, have been introduced in The Netherlands earlier than in Belgium (Flanders as well as Wallonia). This fitted the Dutch policy to stimulate innovative forms of art. Institutional recognition of comics illustrates the democratization of art and culture. Popular culture is now integrated into the arts and culture policy of the Dutch and Belgian governments

Just like the organizations in the comics niche were dominated by publishers from other niches during a long time, comics themselves have also been dependent on other media well into the 20<sup>th</sup> century. Cartoons, gag comics and longer comics stories were published in general magazines and newspapers at first, and only a selection was published again as an album. The comic magazines that came into life in the 1920s and 1930s often started as annexes to newspapers and magazines. Gradually more independent comic magazines were published, like in our case studies *Spirou/Robbedoes* by Dupuis, and after the war magazines like *Sjors* and *Donald Duck*. Especially independent formats for comics drew the critical attention of institutions. Before the Second World War, when most comics were integrated in other media, they were merely ignored, but in the 1940s and 1950s governments in many countries took censoring measures towards specialized comic magazines and their publishers, as was already described above.

These censoring measures later led to new kinds of comics that consciously went beyond moral impediments. In the 1960s a young generation of comic book creators came out of their relatively anonymous position in the traditional comic book industry and began to demand more artistic freedom from their publishers. Many creators were former readers of comics for children, who remembered the imposed limitations of the medium. Innovations, concerning both form and content, that had their origins partly in the counter-culture (or underground) movement, slowly changed the conventions in a part of the industry. In Europe avant-garde and underground artists started their own publishing companies in the 1970s, which gave them more autonomy in their creations. Especially French artists played an active role in these innovations.

A next phase in the development of the medium was that albums became more important as a publishing format for comics. In the course of the 1970s comic magazines began to lose their appeal to a large audience. A decade later comic albums had become the main format for comics. Albums containing stories that had not been published before were the final step to independence of comics as a medium. This coincided with the dominance of *de novo* organizations in the publishers' population: they specialized in comic albums from the beginning. Many of these *de novo* publishers copied the innovations that were introduced by French artists in the 1970s.

Comics reached maturity with regard to content and readers. Since they became popular in the Dutch language area there have always been comics for a more adult audience, but the majority of the production was meant for children. Since the rise of the album as the main format for comics the supply of comics for adolescent and adult audiences has increased. Author's albums, autobiographies and graphic novels added a more personal, sometimes literary or artistic dimension to the new generation of comic albums. Although many popular albums still appear as installments of series (a remainder of the *feuilleton* format - 'to be continued' - of comic stories in the classical magazine comics), there is also a growing number of one shots: albums in which a complete story is told. With regard to their content these albums are comparable with novels. They are marketed in the same way as novels, have a comparable size and price, and are distributed via the same channels (book shops).

### 7.2.2 Micro-level

In the previous subsection there were already some references to individual publishers, especially where general developments could be illustrated by the developments of a single publisher. The analysis at the micro level was necessary to understand the motives of these publishers and to lay bare similarities and differences between *de alio* and *de novo* publishers from both countries. *De alio* and *de novo* publishers each fulfill their own function in the comics publishing niche. Although *de novos* have introduced the more radical innovations, this does not mean that *de alios* have only exploited innovations introduced by *de novos*: they also introduced innovations and thus succeeded in keeping ahead of their competitors. The motives to innovate are different for both kinds of organizations: artistic

de novos introduce unknown artists and experimental comics on the market, because they believe that these comics deserve a platform, whereas de alios innovate to keep ahead of their competitors.

The four cases addressed the role of the singularity of comics for publishers, editors and artists. It is a binding factor between editors and artists. For the idealistic de novo publishers Bries and Oog & Blik their devotion to comics and illustrations was the reason to start publishing. Joost Swarte's personal involvement even led to governmental support for artistic comics like those published by Oog & Blik and Bries, and to an institutional embedding of comics. The de alios VNU and Dupuis needed editors struck by comics' singularity to adapt themselves to the changed preferences of their audiences, and to deal with the self-consciousness of new generations of artists.

The logics for operating on the album market were different from those of the magazine market. Scale was supplemented with or even replaced by scope, and a focus on market and industrial values was replaced by a mixture of market and inspired values. In the smaller de novo publishers these values are expressed by the publishers themselves, and in the de alios there is a distinction between market and industrial values on the management level, and inspired values on the editorial level.

The resources of the publishers shifted from a strong focus on ownership of comics to a combination of ownership and knowledge based resources: networks of editors and publishers with artists and editors from other publishers. The conflict at Dupuis when it was acquired by Média Participations illustrated the importance of editors that had formed such a network.

From the information in Chapter 4 it becomes apparent that the major part of the comics supply in The Netherlands consists of translations from other languages, mainly from French, but also from English and other languages. This was confirmed by the publishing policies of the Dutch case publishers VNU and Oog & Blik. In Wallonia (and France) most comics are home-produced. The Dupuis case illustrated that the success of Walloon comics was caused by historical developments, geographic and cultural factors.

A comparison between both Belgian and both Dutch case publishers revealed that characteristics of the Belgian and the Dutch culture also manifest themselves in different publishing strategies. The negative attitude towards a Belgian identity that

is shared by the Flemish and the Walloons has contributed to typically Flemish and Walloon comics. In The Netherlands the tendency towards compromise has led to a comics' supply that is a mixture of originally Dutch and imported comics.

The export of comics is of crucial importance for Walloon publishers, whereas just a few Dutch and Flemish comics are exported successfully. The Flemish export of the traditional family comics that are still very popular in Flanders is limited nowadays to *Suske & Wiske* from the Vandersteen Studios (published by Standaard Uitgeverij). The other series are too strongly tied to the Flemish culture to be attractive for readers abroad. Artistic comics by the youngest generation of Flemish comics artists that are published by Bries and other, small de novo publishers have gained recognition internationally.

After the international success of comics produced by the Toonder Studios in the 1940s and 1950s, there have only been very few Dutch comics and artists that are known abroad. Typical for the Dutch position in the international comics world is that in both the commercial and the artistic part of the industry the best known Dutch comics have an international character. In the artistic circuit this is illustrated by Joost Swarte. Swarte became well known abroad in the 1970s and 1980s (see Section 6.4). The clear line style that he used in his comics was an adaptation of the style of a Belgian artist: Hergé, the 'godfather' of Western-European comics. In the commercial niche the stories created by Dutch artists who work for *Donald Duck* are exported to many other countries that have Disney comic magazines (see Section 6.3). Commercially these comics are the most successful Dutch comics abroad. Nevertheless they are entirely based on the originally American Disney characters, and the artists have to comply with the rules formulated and controlled by the Disney Corporation.

### 7.2.3 Macro- and micro-level integrated

The findings at macro- and micro-level support each other. In Table 7.1 the evolutions described in the previous two subsections is rendered schematically. An advantage of the table is that it provides an overview of the most important evolutions. A disadvantage is that the nuances in the findings are lost again. E.g. the capabilities for de novos and specialists are in some ways different from those of de alios and generalists, and the developments in The Netherlands differ from those

in Belgium, which has led to a stress on import and translations by Dutch publishers, a stress on originally Flemish comics by Flemish publishers, and on franco-phone comics (from Wallonia and from France) in Wallonia. Nevertheless there are many parallels between the different dimensions of the evolutions of comics. To summarize the main dynamics in both countries:

1. A niche without a clear identity has very gradually developed into a niche with a sharper identity. *De alios* have been replaced by *de novo* publishers. A second generation of *de alio* book publishers that has become active since the last decade can cause a new loss of identity, or a change to another identity.
2. The logics have shifted from market and industrial logics to market and inspired logics.
3. The structure of the field of comics publishers has changed from a concentrated market to a dual market structure to a fragmented market structure. Generalists have been supplemented with or replaced by specialists (in The Netherlands) and polymorphists (in Belgium).
4. The industry developed from Type I to a mixture of Type I and II: scale advantages have been supplemented and/or replaced by scope.
5. The resources have changed from ownership-based to a mixture of ownership-based and knowledge-based.
6. The artists developed from anonymous studio workers into individual artists.
7. Comics evolved from a dependent to an autonomous medium.
8. The album has replaced the magazine as the main medium for comics
9. The audience developed from a homogeneous target group (children and their families) to a heterogeneous audience, including adolescents and adults.
10. The attitude of the institutional environment (government) has changed from neglect to rejection to recognition.

**Table 7.1a Evolutions in the Dutch and Belgian comics niche**

		time line				
		1905-1945	1945-1965	1965-1980	1980-2000	2000-2010
actors, actants and factors	industry period →	formation (identity: no separate niche yet)	magazines and newspaper comics	transition (between magazine and album)	albums (sharper identity: more de novos than de alios)	albums and graphic novels
publishers: organizational form, origin and capabilities	<i>form and origin: resource space and origin of publisher</i>	generalists	generalists	generalists, some specialists	more specialists, some generalists, some polymorphists ( <b>Belgium</b> )	specialists, some polymorphists ( <b>Belgium</b> ), very few generalists
	<i>industrial capabilities</i>	de alio	de alio	de alio, some de novo	More de novo, some de alio	de novos, new generation of de alios (book publishers).
	<i>resource-based capabilities</i>	scale production	scale production	scale and scope production	more scope, less scale production	more scope, less scale production
	<i>logics</i>	ownership of comics	ownership of comics	ownership of comics; networks of artists and editors	ownership of comics; networks of artists and editors	ownership of comics; networks of artists and editors
		industrial and market logics	industrial and market logics	industrial and market logics	some inspired logics ( <b>Belgium</b> )	industrial, market and inspired logics

Table 7.1b Evolutions in the Dutch and Belgian comics niche

		time line				
		1905-1945	1945-1965	1965-1980	1980-2000	2000-2010
actors, actants and factors	industry period →	formation (identity: no separate niche yet)	magazines and newspaper comics	transition (between magazine and album)	albums (sharper identity: more de novos than de alios)	albums and graphic novels
industry		type I	type I	type I and II	mainly type II, partially type I	mainly type II, partially type I
market structure		(developing)	concentrated	from concentrated to dual market structure	dual market structure	from dual market structure to fragmented market
artist		anonymous, pseudonyms, studios	anonymous (except the stars: owners of studios), pseudonyms, studios	post war generation: increasing self-awareness, desire for artistic freedom, working in small teams	recognition within context of popular culture; in-dividuals and small teams	recognition within context of visual arts and literature; authenticity important; in-dividuals and small teams



#### 7.2.4 Evolutions or co-evolutions

To what extent are there co-evolutions in the Dutch and Belgian comics niche? According to Murmann (2003) there is a co-evolution between two populations ‘if and only if they both have a significant causal impact on each other’s ability to persist’ (2003, p. 210). Other developments might merely be a matter of parallel development or co-adaptation (Volberda, 2005, p. 447). In those cases the use of the term co-evolution would be more a metaphor than a fitting theoretical explanation. Therefore in this subsection I will differentiate between co-evolutions and other evolutions.

The dynamics in the comics niche show many parallel developments between the actors and actants involved (audiences, artists, comics, publishers, institutions), but only a few have the kind of reciprocal relationship that affects the ability of the actors to persist. True co-evolutions among the actors are limited to those between artists and publishers, and those that take place within the population of publishers.

In the former co-evolution (between artists and publishers), artists introduce innovations that are diffused by publishers. Artists and publishers are the interactors, and capabilities with regard to creativity are the replicators. Since the innovations of the 1970s artists as well as publishers can choose between ‘old’ and ‘new’ types of comics: comics that were produced on the basis of formulas, versus comics where authenticity and creativity of the artist prevail. Before that, there was not such a choice that had to be made. The fact that there is a choice implies that the co-evolution does not go into just one direction.

In the latter co-evolution (within the population of publishers) the publishers interact with each other, and their capabilities are the replicators. Again, the findings show that the developments of comics have led to new kinds of comics that require different capabilities than the earlier forms, but that they have not completely replaced these earlier forms and the capabilities that were needed for them.

Differentiation within the population of publishers led to a dual market structure, with generalists and specialists. Generalists and specialists have their own capabilities that enable them to compete with comparable organizations. Both resource spaces have their own variation, selection and retention processes. There is no complete replacement of one type by the other one. Many generalist publishers have disappeared, but some of them still survive, and are even quite successful. A

*differential co-evolution* has taken place in the niche of comics. This phenomenon can also be found in nature, as becomes apparent in Durand's explanation of Hull's (biological) evolution theory:

*The interactor interpretation ascribes to the organism different properties and roles. In particular, interactors make replication differential. Indeed, Hull (2001) redefined selection as a process in which the differential extinction and proliferation of interactors cause the differential perpetuation of replicators. To use Hull's terminology, firms would be the interactors that, via the organizational retention process, will lead to organizational lineages in the genealogical hierarchy. Accordingly, in a footnote, Murmann (2003, p. 203) emphasizes that the interactor in his research setting would be the business firm, whereas the replicator would be the business model.*

(Durand, 2006, p. 133)

The reactions of publishers on the innovative comics as produced by comics artists led to the 'differential perpetuation of replicators' (see quote above): the capabilities needed for formula based comics for a homogeneous audience, versus those needed for comics that require more creativity and that are made for heterogeneous audiences. This differentiation led to a new kind of comics publishers: specialists.

Some generalists have survived by adapting to the new circumstances, not by copying the capabilities of the specialists, but by narrowing down their comics supply to only the best sold comics series for a general audience. These publishers have changed their publishing policy, but are still functioning as a generalist.

The other option was to change from a generalist into a polymorphist, as in the case of Dupuis, that still produces albums for a general audience, but in addition has introduced one shots and author's albums for smaller sub-niches. In Belgium polymorphists can survive, because of the export to France and the popularity of all kinds of comics, including author's albums, in the francophone countries. The comics niche in The Netherlands is too small for this type of organization that thrives on a mixture of scale and scope production.

## 7.3 CONCLUSIONS AND DISCUSSION

### 7.3.1 Conclusions

The main question of this research (see Chapter 1) can now be answered:

*Which (co-)evolutions took place within and around the comics industries in The Netherlands and Belgium, and how can they explain the different position of comics and their publishers in these countries in the beginning of the 21<sup>st</sup> century?*

Differential co-evolutions within and between groups of publishers, and between artists and publishers have led to a diffusion of innovations of comics' forms and contents with different outcomes for the present state of comics in The Netherlands and Belgium.

Flanders and Wallonia each have their own comics culture, and in both parts of Belgium comics are more viable than in The Netherlands. During a short period Dutch comics were successful internationally, but the Dutch format (text comics) became outdated and was not adapted to the new format of balloon comics, which were imported from America and introduced in Europe especially by Belgian publishers. Nowadays the comics supply in The Netherlands is a mixture of Dutch and international influences.

The active role of Belgian comics publishers in the past, and their ability to adapt to the changes of logics, have led to their prosperity, although internationally their role has now been surpassed by the success of French comics publishers.

After a period in which magazines were the most important medium for comics, this position was taken over by albums. The album market offered opportunities for small, specialized publishing companies, including publishers with artistic ambitions, and had consequences for the generalist publishers that dominated the niche until then: these adapted to the new circumstances or they disappeared.

The fact that during a long time the majority of the comics publishers in both countries did not have their roots in comics (the *de alio* publishers) led to an ambiguous identity of the comics niche that was further strengthened by the fuzzy properties of the medium itself. This made it difficult for comic albums to attain the status of

an independent, cultural medium. This was especially the case in The Netherlands, and less in Belgium, where comics were accepted as a part of the cultural supply.

In The Netherlands the de novo publishers who specialized in comic albums were too small and too isolated to be able to sharpen the identity of the comics niche outside of the narrow circle of comics shops and comics fans. Artistic de novo publishers did manage to create their own resource space by getting institutional recognition for the artistic value of their publications. A new generation of de alio publishers, that have their origin in the publishing of literature and fiction, has more opportunities to do this.

In both countries comic albums that are marketed as ‘graphic novels’ have the status of literature or as a form of visual art, and are recognized as such by governments and other institutions. However, a substantial part of the comic album supply is still made of series that are formula-based and that testify to the industrial background of the medium.

### 7.3.2 Discussion

#### 7.3.2.1 Theoretical implications

Let us return to the quote from W.R. Scott in the introductory chapter (Section 1.2), in which he pleads for what he calls a structural-cultural analysis of cultural industries:

*It is especially important that researchers examine the effects of organizational and industry structure on the products and services provided. How does the medium affect the message? After all, the products we are talking about are not shoes or sausages. The products of these industries are ideas, values, truths, and dreams: conceptions of who we are and what we could become. If the structuring of the organizations that create and distribute these products affects them in any way, we must seek to understand why and how.*

(Scott, 2006, p. 308)

In this study I have explained how organizational forms and industrial structures have affected comics, and how evolutions of these forms and structures were related to changes of the medium and its identity. Thus my research contributes to the knowledge of the intertwinement between organizations and cultural products that Scott asks for. Moreover, it adds knowledge to a branch of the cultural industries that is still a *terra incognita*, for until now there were no other organizational studies on the area of comics.

The most important theoretical contribution is an integration of several theoretical streams, which improves the value of both the macro- and the micro-side of co-evolutionary research. The starting point was that co-evolutionary research offers useful, but incomplete concepts. Although a number of studies have demonstrated the potential of the co-evolutionary approach, for organizations in general and for cultural industries in particular, there were gaps in the models that led to incomplete or one-dimensional findings. In Chapter 2 these gaps were summarized in Table 2.1 that is repeated here as Table 7.2.

**Table 7.2 Gaps in co-evolutionary research\***

gap	level of analysis	domain
attention for diversity of organizations in the same population	macro	co-evolutionary research in general
effect of societal identity		
attention for roles of individuals	micro	co-evolutionary research in general
attention for diversity of values for actors (organizations and individuals) in art worlds		co-evolutionary research on art organizations and cultural industries

\* = Table 2.1 in Chapter 2

Theories were introduced that could help to bridge these gaps. Organizational ecology (resource partitioning theory, niche identity), industrial organization, institutional theory (comparative historical institutionalism, institutional logics) and art sociology provided concepts that were assumed to be the most useful for this pur-

pose. These concepts and the theories that they are derived from were linked to the gaps, as is shown in Table 7.3 (this table appeared in Chapter 2 as Table 2.3).

These concepts were integrated in the Vari-focus model (or: extended co-evolutionary model), that was named thus because of its attention to both the micro- and the macro- perspective of organizational (co-)evolutions. In the empirical Chapters 4, 5 and 6 the model was tested, and after the general conclusions that were already rendered in the previous subsection, now conclusions with regard to the theoretical implications can be drawn.

From the results it has become clear that the use of the concepts mentioned above led to a nuanced image of the evolutions and co-evolutions that took place in the comics niche in The Netherlands and Belgium. Without the concepts that were added to the existing co-evolutionary models (at the macro- and the micro-level), there would be far less attention for differentiation within the population of publishers, and between the populations in Belgium and The Netherlands, and as a consequence a less accurate image of organizational reality.

On the *macro-level* this differentiation was only realizable by using concepts from *resource partitioning*, *industrial organization* and *niche identity*. The different use of resource spaces by generalists, specialists and polymorphists provides sound explanations for evolutions in the publishers' populations. In addition the industry types I and II and the concentration level (C4) within the population were helpful to analyze the evolutions. This was done by using event history methods and led to insights with regard to the coming into existence of the niche and the effects of legitimation and competition. Findings from earlier research that used comparable variables were confirmed.

Moreover, knowledge about the identity of the niche, as formed by the origin of the publishers in the population (de alio versus de novo), played an essential role in helping to understand why comics have led a relatively marginal existence in comparison with other forms of popular culture (pop music and cinema). During a very long time the niche lacked a sharp identity, and this was caused by the fact that in that period the majority of the publishers had a different background than comics. For them comics were derived products. For de novo publishers that are founded with the purpose to produce comics, this is different. Since their position became stronger, the identity of the comics niche also changed gradually.

Table 7.3a Overview of concepts that bridge the gaps in co-evolutionary research\*

gap	concepts to bridge the gap	theories and scientific domains that the concepts are derived from (and names of authors)	empirical chapter(s) in this book
Attention for diversity of organizations in the same population.	<ul style="list-style-type: none"><li>- Demographic developments of organizations: entry, exit, density dependence, density delay, half life, mortality hazard, product portfolio width.</li></ul>	Organizational ecology (Hannan and Freeman 1977, 1984; Carroll and Hannan 1989; Boone and Van Witteloostuijn 1995; Hannan 2005; Wezel and Van Witteloostuijn 2006).	5, 6, 7
	<ul style="list-style-type: none"><li>- Specialist, generalist, polymorphist;</li><li>- Resource spaces, market structures.</li></ul>	Resource partitioning theory (Carroll, 1985; Carroll and Swaminathan, 2000; Van Witteloostuijn and Boone, 2006).	
	<ul style="list-style-type: none"><li>- De alio and de novo;</li><li>- Multiple category membership of product or genre.</li></ul>	Niche identity (McKendrick and Carroll, 2001; McKendrick <i>et al.</i> 2003; Hannan, 2005; Hsu and Hannan, 2005; Hsu <i>et al.</i> , 2009).	
	<ul style="list-style-type: none"><li>- Type I and Type II industries</li><li>- Market concentration</li></ul>	Industrial organization (Sutton, 1991; Boone and Van Witteloostuijn, 1995, 2004).	

Table 7.3b Overview of concepts that bridge the gaps in co-evolutionary research\*

gap	concepts to bridge the gap	theories and scientific domains that the concepts are derived from (and names of authors)	empirical chapter(s) in this book
Effect of societal identity.	<ul style="list-style-type: none"><li>- Societal effect;</li><li>- National Business Systems;</li><li>- Institutional distance.</li></ul>	Comparative historical institutionalism (Whitley, 1999, 2000; Maurice and Sorge, 2000; Hotho, 2009).	6, 7
Attention for roles of individuals.  Attention for diversity of values for actors (organizations and individuals) in art worlds.	<ul style="list-style-type: none"><li>- Singularity</li></ul>	Art sociology (Heinich, 1996, 2002).	6, 7
	<ul style="list-style-type: none"><li>- Market-oriented and artist-oriented organizations.</li></ul>	Art sociology: field theory (Bourdieu 1980, 1993), art worlds (Becker 1982). Institutional logics (Glynn and Lounsbury 2005).	
	<ul style="list-style-type: none"><li>- Value regimes; editorial, inspired, industrial and market logics.</li></ul>	Institutional logics (Fligstein, 1990; Thornton, 2004; Thornton and Ocasio, 2008). Common worlds' theory (Boltanski and Thévenot 1999, 2006).	

\* = Table 2.3 in Chapter 2



On the *micro-level* partly the same concepts were used to differentiate between the organizational types. The choices for the case studies were based on the distinction between *de alios* and *de novos*, and between generalists, specialists and polymorphists. A final criterium was the country or origin: in the sample for the case studies publishers from The Netherlands and Belgium were represented, and among the Belgian case publishers there was a Dutch speaking (Flemish) one and a francophone (Walloon) one. There was an overlap between the categories which made it possible to limit the total number of case studies to four, and still cover all the types, both countries, and both languages.

To analyze the developments within each of the publishers, concepts from *institutional theories* (institutional logics and comparative historical institutionalism/-societal effect) and *art sociology* were used. The knowledge from *institutional logics* enabled us to understand the shifts from one kind of capabilities to another one. Especially for the generalists the switch from the production of comic magazines for children and families to albums for diverse audiences led to a change of logics that had consequences for their structure: more attention had to be paid to the knowledge and networks of editors.

Earlier findings from institutional logics were partially confirmed: the large companies VNU and Média Participations (that acquired Dupuis) show the same shift from products to financial motives that Thornton (2004) had discovered earlier in her study of the evolutions of publishers of educational books. But there were also other, contrary dynamics. As was explained by the resource partitioning theory concentration within the comics market led to the entry of many specialists, who each addressed specific sub-niches. Generalists disappeared, limited their supply, or adapted themselves to the album market, for instance by employing editors that had a strong passion for comics. In the end, VNU disposed of all their magazines and comics, a radical choice that was based on the prevalence of financial values in the organization, but Dupuis changed from a generalist into a polymorphist and produced comics for smaller groups of fans as well as popular series for a more general audience.

The album market offered more opportunities for small market- and artist-oriented publishers than the magazine market. The artist-oriented publishers were supported by a growing acceptance of the artistic potential of the medium, which even led to subsidies for comics artists from governmental institutions.

Relevant for these findings was the use of value-regimes that were derived from the *common worlds' theory* by Boltanski and Thevenot (1999, 2006). These made it possible to lay bare the shifts of values within the same publishers in the course of time, and to discover the differences of the values within and between organizations. For the more market-oriented publishers VNU and Dupuis inspired editors were necessary in order to be able to compete successfully with other publishers in the album age. Because of this there is a continuous tension between the management layer, for whom market and industrial values prevail, and the editorial departments. The more artistically driven publishers cannot survive if they focus only on inspired values. Here the balance between commercial and artistic values is often united in one and the same person.

The importance of comics for editors and for the *de novo* publishers can be expressed on the individual level in terms of *singularity*: the passion for comics that leads to a life-long devotion to this medium. The effect that comics have on fans is comparable with that of more traditional arts on people who devote their lives and careers to that art form. Without these committed people a large part of the industry would probably not exist. Comics' singularity was the reason why editors at the *de alios* VNU and Dupuis chose that job. The fact that comics' singularity is also a basic motive for the people behind idealistic *de novo* publishers to start a career in the comics industries is less remarkable. Singularity is a source of careers in the cultural industries, and not only in traditional arts organizations, something that the inventor of the term, the art sociologist Nathalie Heinich, might not have expected.

The risk of the terms *autonomous and heteronomous* art organizations that are derived from Bourdieu's field theory (1989, 1993) is that they suggest that there are art organizations that are completely independent of any selection from the outside world (autonomous organizations), and on the other side that there are companies that are only led by commercial values (heteronomous organizations). This leads to a black and white dichotomy that does not do justice to reality. As was shown, large commercial publishers have departments that are led by inspiration and creativity. On the other hand small, more idealistic companies have to take market values into account, if they aspire to survive. The division into *market-oriented* versus *artist-oriented* organizations (Glynn and Lounsbury, 2005) leaves more room for interpretation. Boltanski and Thevenot's (1999, 2006) value regimes were applied on the individual level, which revealed the tensions between differing values within a single company.

The differences between the evolutions of comics in the Netherland and Belgium are consequences of a *societal effect*. Concepts based on general societal features of both countries were less useful to explain these differences than specific institutions, formal and informal. Propositions based on an expected reticent role of the Dutch government with regard to support to and regulation of the market were rejected, because The Netherlands are more supportive on the specific areas of art and culture than on other areas. The difference between foreign direct investment of Belgium into The Netherlands and France was smaller than expected, and could only be explained by the fact that the institutional distances between these three countries are too small to affect foreign direct investment.

The poor predictable power of variables based on general societal features (country clusters and business systems) revealed that these concepts are mainly useful on a very high aggregation level: a comparison including all industries and large numbers of countries. In case of a research into just one industry in a small number of countries, an interpretive approach should be taken, that addresses formal and informal context-specific factors. Among the formal factors in this research were the policy on arts and culture in The Netherlands, and the French Youth Law that led to censorship of comics in France. The cultural identity of Belgium is an informal factor. This identity cannot be caught in general typologies, but it determined at least partly the active role of Belgium in the evolution of comics. In addition general environmental factors like geographic and cultural proximity (between Wal-lonia and France) were important to understand the differences between the countries.

A crucial consideration for research that uses the *co-evolutionary perspective* is the balance between data collecting and analyzing on the macro-level and on the micro-level, and the attunement of the findings on both levels. If on the macro level data can be found that are suitable for statistical analysis, such analyses should be part of the research methods, because they improve the validity of the conclusions. Moreover, concepts from organizational ecology and its variants should be used to make sharper differentiation possible of the organizations within the population. For findings on the micro-level another direction has to be chosen: that of interpretation. For the macro-part complete populations have to be studied, but for the micro-part choices have to be made with regard to individual organizations that are most suitable for case studies. Interpretive research has an explorative character, and statistical research an explanatory character. Findings from both perspectives

can support each other, but it will remain a challenge to find a combination that fits exactly with the object of the research.

For co-evolutionary research into cultural industries and arts organizations the tension between artistic and economic values is a returning, crucial subject. In order to prevent one-dimensional conclusions attention should be paid to the distribution of these values and corresponding logics in individual organizations and whole populations, and to changes in the balance between creativity and commerce in the course of time. In the research this was done by paying attention to the differentiation within a population, and within a company.

### 7.3.2.2 *Limitations*

Not all data that could have been relevant for this research were available. There are hardly any data concerning the turnover of comics in general, let alone figures from all individual publishers in the population. There are no exact data about the sizes of the companies, although it is clear that the majority of the comics publishers is (very) small. If data concerning turnover and size would have been available, additional analyses would have been possible. The lack of availability of these data is not only a problem of comics publishers, but of Dutch and Belgian book publishers in general.

For the same reasons it proved to be impossible to find data (within an acceptable span of time) necessary to label each publisher in the database as either *de alio* or *de novo*. Not only are many publishers in this niche very small, most of these small companies have also been active only for a short time as a comics publisher or have published a small number of comics. Both factors make it difficult to trace their origins.

The database used for the statistical analyses was valid until 1998. Therefore the years that followed were not included. For the case studies, that were updated as far as possible, alternative sources had to be used for more recent years.

There is no database available with a complete list of French language comics published by Belgian publishers. For the period used in the statistical analyses this shortcoming did not have many consequences, because until the end of the 1990s

the large Walloon publishers published a Dutch and a French version of almost all their albums. This means that the numbers of Dutch language albums produced by Walloon publishers in the database mirror their French album production. There are French comic-databases on the internet, of which the most complete one is *Bedetheque*. It is meant for comics collectors and based on an extensive database of comics produced by Belgian and French publishers. The proprietors of *Bedetheque* were approached with the request to cooperate in an early stage of this research, but unfortunately they did not want to share their data. Perhaps in the future such a possibility will arise. A database that includes all comic albums produced by French publishers would make a comparison possible between evolutions of all French, Belgian and Dutch publishers.

Finally, in the case studies a limited number of publishers were chosen that represent *de alios* and *de novos*, generalists and specialists, from both countries, and from both language areas in Belgium. For the *de novo*/specialist cases a Dutch and a Flemish artist-oriented, innovative publisher were chosen, to make a clear distinction possible between the organizational types. However, among the Belgian and Dutch *de novo*/specialist publishers there are others that are less artist-oriented and innovative, and that have a publishing policy comparable with that of *de alios*/generalists.

### 7.3.2.3 Future research

Above new directions for research in the area of comics have already been mentioned. The possibilities of research on a macro-level partly depend on the availability of data about the whole population. A comparison that includes more countries would lead to more insight in the impact of societal effects on cultural industries.

As was said in the conclusions the new generation of *de alios* - publishers that have their origin in book publishing - that publish graphic novels, can cause a new change in the identity of the niche. Comics might become perceived as just another genre of books, instead of a fuzzy mixture of a magazine and a book, or as an independent medium. The impact of these new *de alios* and the phenomenon of the graphic novel are interesting subjects for future research. The proposals by Hsu and Hannan (2005) and Hsu *et al.* (2009) with regard to the relationship between the

identity of a niche and the perception of the products in that niche by audiences are a good starting point for such new research.



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### INTERVIEWS (see Appendix I for more detailed information)

- Hansje Joustra, May 16 2006, Amsterdam.
- Joost Swarte, June 12 2006, Haarlem.
- Hans Matla, November 19 2008, The Hague.
- Hans van den Boom, January 13 2009, Zelhem.
- Silvio van der Loo, February 11 2009, Den Bosch.
- Mat Schifferstein, February 12 2009, Amsterdam.
- Jacques Post, February 18 2009, Amsterdam.
- Pieter van Oudheusden, March 5 2009, Rotterdam.
- Thom Roep, March 25 2009, Hoofddorp.
- Meerten Welleman, March 27 2009, Amsterdam.
- Frits van der Heide, April 2 2009, Zandvoort.
- Guy De Jonckheere, April 21 2009, Brussels.
- Erwin Cavens, April 21 2009, Brussels.
- Paul Herman, April 23 2009, Brussels.
- Bart Pinceel, April 23 2009, Leuven.
- Rob Harren, May 14 2009, Haarlem.
- Ger van Wulften, May 14 2009, Amsterdam.
- Johan Stuyck, May 26 2009, Leuven.
- Johan De Smedt, May 28 2009, Antwerp.
- Ria Schulpen, May 28 2009, Antwerp.
- Ron Poland, June 16 2009, Hilversum.

Peter Middeldorp, July 2 2009, Bloemendaal.

Cees de Groot, July 7 2009, Amsterdam.

Har van Fulpen, July 15 2009, Dongen.

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**Websites for comics' fans and collectors, websites of publishers:**

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BDoubliéés	<a href="http://www.bdoubliees.com/">http://www.bdoubliees.com/</a>
Bedetheque	<a href="http://www.bedetheque.com/">http://www.bedetheque.com/</a>
Bries	<a href="http://www.bries.be/">http://www.bries.be/</a>
Catawiki	<a href="http://www.catawiki.nl/catalogus/1888-strips">http://www.catawiki.nl/catalogus/1888-strips</a>
De Officieuze Strippagina	<a href="http://www.strippagina.nl/">http://www.strippagina.nl/</a>
De Stripspeciaal-Zaak	<a href="http://www.stripspeciaalzaak.be/">http://www.stripspeciaalzaak.be/</a>
De Zilveren Dolfijn	<a href="http://www.zilverendolfijn.nl/">http://www.zilverendolfijn.nl/</a>
Dupuis	<a href="http://www.dupuis.com">http://www.dupuis.com</a>
Lambiek.net	<a href="http://www.lambiek.net/1/home.htm">http://www.lambiek.net/1/home.htm</a>
Média Participations	<a href="http://www.media-participations.com/">http://www.media-participations.com/</a>
Oog & Blik	<a href="http://www.oogenblik.nl/">http://www.oogenblik.nl/</a>
Sjors en Sjimmie	<a href="http://www.sjors-en-sjimmie.nl/home/home.asp">http://www.sjors-en-sjimmie.nl/home/home.asp</a>





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**Appendix Ia List of interviewees (Chapter 6)**

<b>name interviewee</b>	<b>function</b>	<b>publishing company /organization</b>	<b>date of interview</b>	<b>location of interview</b>	<b>length of interview</b>
Hansje Joustra	publisher	Oog & Blik	16-5-2006	Amsterdam	1:35
Joost Swarte	artist, designer, former publisher, expert	(Oog & Blik, De Harmonie)	12-6-2008	Haarlem	2:25
Hans Matla	publisher	Panda	19-11-2008	Den Haag	1:56
Hans van den Boom	former publisher	Arboris	13-1-2009	Zelhem	3:18
Silvio van der Loo	publisher	Silvester	11-2-2009	Den Bosch	1:20
Mat Schifferstein	publisher, translator	Sherpa	12-2-2009	Amsterdam	1:50
Jacques Post	publisher	L / M	18-2-2009	Amsterdam	1:15
Pieter van Oudheusden	translator, expert	n/a (freelancer)	5-3-2009	Rotterdam	1:23
Thom Roep	main editor Donald Duck	Sanoma	25-3-2009	Hoofddorp	1:56
Meerten Welleman	editor, expert	Oberon, Big Balloon, Stripschap	27-3-2009	Amsterdam	1:43
Frits van der Heide	former editor, translator	Oberon	2-4-2009	Zandvoort	1:09
Guy De Jonckheere	editor	Casterman	21-4-2009	Brussel	1:46
Erwin Cavens	editor	Ballon Media, Dupuis	21-4-2009	Brussel	1:23

**Appendix Ib List of interviewees (Chapter 6)**

<b>name interviewee</b>	<b>function</b>	<b>publishing company /organization</b>	<b>date of interview</b>	<b>location of interview</b>	<b>length of interview</b>
Paul Herman	publisher	Glenat Benelux	23-4-2009	Brussel	1:55
Bart Pinceel	distributor	Pinceel	23-4-2009	Leuven	0:55
Rob Harren	publisher	De Boemerang, Oberon	14-5-2009	Haarlem	1:48
Ger van Wulften	publisher	Espee, CIC, Extra, Semic Press	14-5-2009	Amsterdam	1:19
Johan Stuyck	publisher	Oogachtend	26-5-2009	Leuven	1:00
Johan De Smedt	editor	Standaard	28-5-2009	Antwerpen	1:30
Ria Schulpen	publisher	Bries	28-5-2009	Antwerpen	1:24
Ron Poland	distributor	Strips in Voorraad, Het Raadsel	16-6-2009	Hilversum	0:54
Peter Middeldorp	former (main-)editor Robbedoes, Pep, Libelle, manager VNU magazines	Dupuis, Geill Pers, Spaarnestad, VNU	2-7-2009	Bloemendaal	0:41
Cees de Groot	former publisher	Big Balloon, Oberon	7-7-2009	Amsterdam	0:50
Har van Fulpen	publisher, former distributor	Sombrero, Betapress, Drukkerwerk	15-7-2009	Dongen	1:07

Table 5.4 Real publishers, Model 1

negative binomial regression      number of obs = 50  
dispersion = mean      LR  $\chi^2(5)$  = 73.69  
log likelihood = -140.9464      prob >  $\chi^2$  = 0.0000  
pseudo  $R^2$  = 0.2072

entries_publ	coef.	std. err	z	P> z	[95% conf. interval]	
density_pub L1	0.0847016	0.0119736	7.07	0.000	0.0612338	0.1081694
density <sup>2</sup> _pub L1	-0.000423	0.0000748	-5.66	0.000	-0.0005696	-0.0002765
C4 L1	4.655692	0.8238705	5.65	0.000	3.040936	6.270449
albums L1	0.000164	0.0007137	0.23	0.818	-0.0012348	0.0015627
industry_t~e	-0.0143666	0.0076991	-1.87	0.062	-0.0294566	0.0007234
_cons	0.8688414	1.085202	-0.80	0.423	-2.995799	1.258116
/lnalpha	-4.984299	2.289103			-9.470858	-0.4977402
alpha	0.0068446	0.0156679			0.0000771	0.6079028

likelihood-ratio test of alpha = 0:      chibar<sup>2</sup>(01) = 0.23      prob>=chibar<sup>2</sup> = 0.318

Table 5.4 Real publishers, Model 2

negative binomial regression      number of obs = 40  
dispersion = mean      LR  $\chi^2(5)$  = 37.32  
log likelihood = -55.262515      prob >  $\chi^2$  = 0.0000  
pseudo  $R^2$  = 0.2524

entries_publ	coef.	std. err	z	P> z	[95% conf. interval]	
density_pub L1	0.1134907	0.1749342	0.65	0.516	-0.229374	0.4563553
density <sup>2</sup> _pub L1	-0.0093716	0.005463	-1.72	0.086	-0.020079	0.0013357
C4 L1	0.2758235	0.7764965	0.36	0.722	-1.246082	1.797729
albums L1	0.0230723	0.011409	2.02	0.043	0.000711	0.0454336
industry_t~e	0.0916988	0.0415745	2.21	0.027	0.0102142	0.1731834
_cons	-6.423238	2.227792	-2.88	0.004	-10.78963	-2.056847
/lnalpha	-14.75901	799.5903			-1581.927	1552.409
alpha	3.89e-07	0.0003113			0.000000	0.000000

likelihood-ratio test of alpha = 0:      chibar<sup>2</sup>(01) = 0.0e+00      prob>=chibar<sup>2</sup> = 0.500

Table 5.4 Real publishers, Model 3

negative binomial regression      number of obs = 50  
dispersion = mean      LR  $\chi^2(5)$  = 76.29  
log likelihood = -139.6486      prob >  $\chi^2$  = 0.0000  
pseudo  $R^2$  = 0.2145

entries_publ	coef.	std. err	z	P> z	[95% conf. interval]	
density_pub L1	0.0836133	0.0113974	7.34	0.000	0.0612748	0.1059517
density <sup>2</sup> _pub L1	-0.0004373	0.000071	-6.16	0.000	-0.0005763	-0.0002982
albums L1	-0.0002459	0.0007233	-0.34	0.734	-0.0016636	0.0011717
industry_t~e	-0.0123401	0.007374	-1.67	0.094	-0.0267929	0.0021126
c4_p1 L1	4.279077	.8208473	5.21	0.000	2.670246	5.88790
c4_p2 L1	5.139918	.8297051	6.19	0.000	3.513726	6.76611
_cons	-0.7643811	1.03039	-0.74	0.458	-2.783907	1.255145
/lnalpha	-10.05012	255.8524			-511.5116	491.411
alpha	0.0000432	0.0110478			7.1e-223	2.6e+213

likelihood-ratio test of alpha = 0:       $\chi^2_{bar}(01)$  = 0.0e+00      prob>= $\chi^2_{bar}$  = 0.500





Table 5.5 Whole population, Model 2

negative binomial regression      number of obs = 40  
dispersion = mean      LR  $\chi^2(5)$  = 53.63  
log likelihood = -57.481742 pseudo  $R^2$  = 0.0000  
prob >  $\chi^2$  = 0.3181

entries_to~1	coef.	std. err	z	P> z	[95% conf. interval]	
density_to~1 L1	0.0010801	0.1461365	0.01	0.994	-0.2853421	0.2875024
density^2_to~1 L1	-0.0049524	0.0034916	-1.42	0.156	-0.0117958	0.001891
C4 L1	-0.1390709	0.6426449	-0.22	0.829	-1.398632	1.12049
albums L1.	0.0238283	0.0104633	2.28	0.023	0.0033206	0.0443359
industry_t~e	0.1296515	0.04951	2.62	0.009	0.0326137	0.2266894
_cons	-7.85972	2.645304	-2.97	0.003	-13.04442	-2.675019
/lnalpha	-16.66673	1200.491			-2369.586	2336.252
alpha	5.78e-08	0.0000694			0	0

likelihood-ratio test of alpha = 0:       $\text{chibar}^2(01) = 0.0\text{e}+00$       prob>= $\text{chibar}^2 = 0.500$



### Appendix IIIa Evolutions at VNU (Section 6.3, 1950s)

content	inner context	outer context	process
New product: comic magazines change from a dependent into an independent medium: <i>Sjors</i> and <i>Donald Duck</i> .	Development of marketing concepts within company: more attention for children as separate target group. No separate departments for comic magazines yet..	<p>DS: Success of independent magazine <i>Donald Duck</i> of competitor DGP. Examples from abroad: English comic magazines.</p> <p>DGP: increasing popularity of Disney in Europe; Egmont's strategy to conquer Europe with Disney magazines. Disney's policy to prevent powerful license holder.</p>	<p>DS: Launch of <i>Sjors</i> in 1954, after having been annex for almost twenty years; more comics in magazine, partly imported, partly Dutch production; gradually changing into a magazine for boys.</p> <p>DGP: Already since 1930s comics in annexes to magazines for adults. Launch of <i>Donald Duck</i> in 1952 with huge promotion action, still showing link with established magazine <i>Margriet</i> to gain trust with parents. License given by European representative of Disney after having seen retailer-distribution system of DGP.</p>
Albums: incidentally, only most popular titles from magazines ( <i>Sjors</i> , <i>Donald Duck</i> & <i>Andere verhalen</i> , <i>Tom Poes</i> )			

### Appendix IIIb Evolutions at VNU (Section 6.3, 1960s)

content	inner context	outer context	process
Product differentiation: new comic magazines <i>Pep</i> (DGP) and <i>Tina</i> (DS).	See above, plus: competition within VNU (after merger in 1965).	DS: Examples from abroad: English comic magazines. DGP: Examples from abroad: <i>Tintin</i> magazine, example from DS: <i>Sjors</i> .	DS: In 1967 launch of <i>Tina</i> , from its start a comic magazine for girls. Comics partly imported, partly Dutch production.  DGP: 1962 launch of <i>Pep</i> , mixture of Belgian ( <i>Tintin</i> ), American (Disney) and Dutch comics.
New formulas for magazines: more room for French, Belgian and Dutch comics.	See above. Separate editing functions for comic magazines.	DS and DGP: success of <i>Spirou</i> and <i>Pilote</i> , comic readers grow older: development of comics for adolescents.	DGP: Hiring experienced comic editor Peter Middelorp, with knowledge of Belgian comics; first editor specialized in comics within DGP; Middelorp changes formula of <i>Pep</i> , introduces more young Dutch artists, and French comics from <i>Pilote</i> , a.o. <i>Asterix</i> and <i>Lucky Luke</i> .  DS: Middelorp switches to DS and advises editor of <i>Sjors</i> to change formula, by introducing comics from <i>Spirou</i> (Peyo, Franquin, Roba, Tillieux).
<b>Albums:</b> more systematic album production, influenced by Dupuis and Lombard. Introduction of <i>Asterix</i> and <i>Lucky Luke</i> albums.			

### Appendix IIIc Evolutions at VNU (Section 6.3, 1970s and 1980s)

content	inner context	outer context	process
<p>Merger of <i>Sjors</i> and <i>Pep</i> into <i>Eppo</i>, new formula for <i>Donald Duck</i>, differentiation of Disney magazines, more room for Dutch Disney stories.</p>	<p>Reorganization; advice from McKinsey to work more efficiently:</p> <ol style="list-style-type: none"> <li>1. Stopping of individual retailers ('wederverkopers') and start of Aldipress distribution organization.</li> <li>2. Founding of Oberon: all comics and youth publications together.</li> <li>3. Founding of Amsterdam Boek: all VNU book publications produced and distributed by them.</li> </ol> <p>Policy to prevent dependence on foreign comic suppliers.</p> <p>Internal competition.</p>	<p><i>Sjors</i> and <i>Pep</i>: numbers of readers start to decrease: more leisure possibilities for children.</p> <p><b>Album market grows.</b></p> <p>Nostalgia: first generation of <i>Donald Duck</i> readers interested in classic <i>Duck tales</i></p>	<p>Oberon succeeds in getting comic albums back from Amsterdam Boek to Oberon.</p> <p>More Dutch comics and more albums produced; separate functions for magazines, albums, marketing, merchandising and licensing; comic artist part of editorial team; licensing contract with Dargaud for publishing their albums on Dutch market.</p> <p>Stopping of 'wederverkopers'-system makes it more difficult to sell albums directly to customers.</p> <p><i>Donald Duck</i>: republish classic <i>Duck tales</i> by Carl Barks in order to attract older readers. Introduction of <i>Mickey Maandblad</i>, with longer stories. Founding of Dutch studio for production of stories for <i>Donald Duck</i> (also for export).</p>

Appendix IIIId Evolutions at VNU (Section 6.3, 1990s)

content	inner context	outer context	process
VNU pushes off more risky comics and keeps most profitable comics <i>Donald Duck</i> and <i>Tina</i> . Differentiation of Disney comics.	VNU becoming bigger and more money focused.	Market for comic magazines becoming uncertain and risky; more competitors.  <b>Dargaud publishes albums themselves.</b>	Big Balloon started; 52% owned by VNU. Big Balloon publishes Eppo and successors. The magazine stops in 1999.  <b>Focus more on albums than on magazine.</b>  Most successful comics remain at VNU (Disney and <i>Tina</i> ).  <b>More <i>Donald Duck</i> and Disney albums, pockets , specials.</b>

Appendix IIIe Evolutions at VNU (Section 6.3, 2000s)

content	inner context	outer context	process
VNU sells all magazines to Sanoma. Big Balloon independent.	See above.	Market for magazines in general becoming uncertain and risky.	<i>Donald Duck</i> and <i>Tina</i> successful products within Sanoma. Further differentiation of Disney publications.  VNU shares in Big Balloon sold to employees.  Only album publications.
	<b>Big Balloon: relatively large, less flexible than competitors on album market. No ownership off internationally successful comic album series.</b>	BB: Fierce competition in album sector. Less bestsellers. Increasing isolation of albums sales in comic shops.	<b>BB: in 2005 stops publishing comic albums altogether.</b>  Focus on buying licenses related to tv cartoons for young children.

# Appendix IVa Evolutions at Oog & Blik (section 6.4, 1984-1995)

content (what)	inner context	outer context	process
From distributor to distributor and publisher.	<p>Ambitions of founders Hansje Joustra and Joost Swarte to expand activities, after success of Het Raadsel.</p> <p>(Small) comic publishers have no access to bookshops.</p>	<p>Success of Het Raadsel after other independent distributor of comics Drukwerk went out of business.</p> <p>Request to publish albums formerly produced by small publisher Gezellig &amp; Leuk (Windig and De Jong). Other innovative comic artists who were looking for an independent comic publisher. Market for adult albums growing.</p>	<p>Two separate companies for distribution (Het Raadsel) and publishing (Oog &amp; Blik).</p> <p>Choosing artists that are known for their quality and independence: Swarte himself, Crumb and Van den Boogaard. Launch of first albums under flag of O&amp;B at <i>Stripdagen Haarlem</i>, also founded by Joost Swarte. Mainly Dutch and American comic albums.</p>
Close collaboration with a literary publisher and with another comic publisher.	Share risks with others.	<p>Make clear to business partner De Harmonie that the publishing company and the distributor were two separate companies.</p>	<p>Coproductions with De Harmonie and Sherpa. Task division with De Harmonie: coproductions are distributed in bookshops by the one and in comic shops by the other firm.</p>



Appendix IVb Evolutions at Oog & Blik (section 6.4, 1995-2004)

content (what)	inner context	outer context	process
Publishing of first subsidized Dutch comics.	Publishing originally Dutch, innovative albums by young artists is expensive. Aim to publish these kinds of comics.	Innovative comics gradually becoming accepted as form of art. Art funds BKVB accepts Swarte as adviser on comics.	Joost Swarte convinces Art Funds that innovative Dutch comics should also be subsidized. Swarte writes in newspaper about possibilities for comic artists to get subsidized.
More translated comics from French, a.o. reprints of albums by Bilal and Moebius.	Internal subsidizing: the French artists are already well-known and their albums fit in the portfolio of O&B.	Dutch publisher Big Balloon, who formerly published these albums on the Dutch market, has stopped publishing originally French comic albums.	Rights of these albums had been sold by Dargaud to Les Humanoïdes Associés. O&B licenses the rights of the French albums from Les Humanoïdes Associés.

# Appendix IVc Evolutions at Oog & Blik (section 6.4, 2005-2010)

content (what)	inner context	outer context	process
<p>Looking for new publishing partner.</p> <p>Joint venture with De Bezige Bij in 2009.</p> <p>Oog &amp; Blik acquired by De Bezige in 2010.</p>	<p>Bankruptcy of Het Raadsel at end of 2004. Too little income for owners O&amp;B to remain independent.</p> <p>Sherpa-owner Schifferstein, who also works for O&amp;B and Het Raadsel, resigns.</p>	<p>Hardly any co-productions with de Harmonie after 2008.</p> <p>Stopping of co-productions with Sherpa in 2006.</p> <p>After disappearance of Het Raadsel less distribution possibilities to comic shops.</p> <p>Increasing popularity of 'graphic novels' in media and a trend among publishers of literature and fiction. De bezige Bij: competition with other literary publishers.</p>	<p>Joustra actively looking for a new partner; at same time De Bezige Bij looking for high quality comics / graphic novels.</p> <p>After a try-out period in 2009, finally acquisition in 2010. O &amp; B keeps editorial independence.</p> <p>Office moves to Bezige Bij building. Hansje Joustra and daughter are now Bezige Bij employees.</p>

# Appendix Va Evolutions at Dupuis (Section 6.5, 1938-1940s)

content	inner context	outer context	process
<p>New product: independent comic magazine: <i>Spirou</i> / <i>Robbedoes</i>.</p> <p><i>Spirou</i> becomes <b>independent of imported American comics</b>: only originally Belgian and French comics.</p> <p>Development of <i>School of Marcinelle</i>: artists with their own style of drawing and telling stories.</p>	<p>Success of other magazines of Jean Dupuis.</p> <p>More attention for children as separate target group.</p> <p>Extension of family business: involvement of sons and sons-in-law in company.</p> <p>Aim of Dupuis to become independent from external suppliers.</p> <p>Jijé forced to draw his versions of American comics.</p> <p><i>Spirou</i> widely read; Dupuis attractive for young artists.</p>	<p>Belgian and French <b>competitors</b> (other comic magazines).</p> <p><b>'Good' example:</b> <i>Le Petit Vingtième</i>: magazine of Hergé's <i>Tintin</i> (very popular already in 1930s).</p> <p><b>'Bad' example:</b> <i>Le Journal de Mickey</i>: mainly American comics; Dupuis wants to offer a catholic alternative.</p> <p><b>Second World War:</b> no import of American comics.</p> <p><b>Competition</b> with other comic magazines, <b>especially with <i>Tintin</i> magazine</b>.</p>	<p><b>Charles Dupuis</b> becomes responsible for <i>Spirou</i>. Son-in-law Pierre Matthews manages Dutch division.</p> <p><b>Dupuis</b> searches actively for Belgian and French talents. Looks for artists who have same style as Hergé.</p> <p><b>Rob-Vel</b> creates <i>Spirou</i> character. Jijé and others start to draw.</p> <p><i>Spirou</i> and <i>Robbedoes</i> sold in Belgium, France and the Netherlands.</p> <p><b>Jijé</b> draws American comics and develops his own drawing style. Jijé invites other artists and teaches them how to draw.</p> <p><b>Jijé, Morris, Franquin and Will</b> share house and studio. Jijé, Morris and Franquin improve their drawing qualities in America. Morris meets Goscinny. Close collaboration with editor Yvan Delporte. Training of young artists. Goscinny starts writing scenarios for Morris' <i>Lucky Luke</i>.</p>

Appendix Vb Evolutions at Dupuis (Section 6.5, 1950s and 1960s)

content	inner context	outer context	process
<p><b>Adaption to French market.</b></p> <p>Album formula: prepublication in <i>Spirou</i> and publication in albums of most popular series. Fixed length of albums.</p>	<p>Dupuis sees <b>possibilities to extend market</b>.</p> <p>Dupuis <b>printing division</b>: ownership of modern printing machines makes fast and efficient production possible. Additional source of income; relatively cheap: investments have already been done. Ownership of Dupuis printing division. Paper scarcity.</p>	<p>French youth law of 1949: censorship, but also chance for Dupuis to enter French market. French publishers had not yet developed their own schools of artists.</p> <p>Success of Casterman's <i>Tintin</i> albums, competition with Lombard albums from <i>Tintin</i> magazine.</p>	<p><b>Censorship</b> by Charles Dupuis. <b>Self-censorship</b> of artists to prevent measures based on youth law.</p> <p>Artists <b>change Belgian setting of their stories</b> to French or vaguely international setting.</p> <p><i>Spirou</i> readers' panels; which series are most popular. Albums distributed via own distribution systems in France, Belgium and The Netherlands.</p>

# Appendix Vc Evolutions at Dupuis (Section 6.5, 1970s)

content	inner context	outer context	process
Extension of album production; new generation of <i>Spirou</i> artists.	Less income from <i>Spirou</i> , Morris and other artists leave (for <i>Pilote</i> ) or become less productive. New artists and new series in <i>Spirou</i> .	Extension of album supply from competitors.  Growth of market for albums. More leisure possibilities for youth: comic magazines les popular.	<b>New album department</b> , led by Thierry Martens. New artists actively looked for. <b>Carte Blanche annex as exhibition space</b> in <i>Spirou</i> .
<b>Le Trombone Illustrée: adult comics-annex in <i>Spirou</i></b>	Franquin and Delporte want to innovate <i>Spirou</i> ; Charles Dupuis sees opportunity to reach new adult audience.	Rise of adult comics magazines and albums, mainly in France, from former <i>Pilote</i> artists	Franquin and Delporte are aware of changes in the comics field. They approach Charles Dupuis with the concept. Dupuis, as an admirer of Franquin, passes <i>Spirou</i> editors. After thirty issues, <i>Le Trombone</i> is stopped, because there are complaints from parents of <i>Spirou</i> readers. Editors are also opposed to the annex.

Appendix Vd Evolutions at Dupuis (Section 6.5, 1980s)

content	inner context	outer context	process
Album logics instead of magazine logics.	Under Charles Dupuis stagnation of policy: no real innovations.  Dropping numbers of readers for <i>Spirou</i> .	New, adult audience.  Young artists who aim for artistic freedom and recognition, inspired by French former <i>Pilote</i> artists.	Jean van Hamme appointed as publisher Experienced with new album market and with marketing. Introduces <i>Aire Libre</i> concept.
Introduction of adult, one-shot, non republished albums: <i>Aire Libre</i> collection.	Albert Frère as acquirer discovers that continuity of Dupuis is threatened.	New audiences and artists associate Dupuis with children's comics.  <b>Album has become substitute for magazine.</b>  New distribution channel: comic shops.  Strong album competitors in Belgium and France: comparable series by Dargaud, Lombard and Casterman.	Vandooren and later Gendrot execute the plans. Developing of network of artists. Series with own logo, no mentioning of Dupuis logo on cover.  At the same time Dupuis stays active on market for children's comics.

# Appendix Ve Evolutions at Dupuis (Section 6.5, 1990s and 2000s)

content	inner context	outer context	process
More albums and series on francophone market.	Acquisition by Média Participations. Internal competition (with MP publishers Lombard and Dargaud).	Extension of series. Fierce competition. Further growth of francophone market.	Conflicts between MP and Dupuis editors, artists and publishers: loss of autonomy.
Dutch market: stopping with <i>Robbedoes</i> , less translations into Dutch, albums subcontracted to partially owned Ballon Media  (plus new activities on web, animation, games).	French orientation of Média Participations. More focused on efficiency: Dutch language area relatively small.  (developing strategies to adapt to changing taste of audience: digital media).	Former manager of De Stripuitgeverij starts Dutch production and publishing company Ballon Media.  (popularity of new media; new media as substitute of albums).	Selling De Stripuitgeverij, stopping with Dutch language department, buying 20% of shares of Ballon Media.  (new divisions dedicated to new media, games and animation).

# Appendix VIa Evolutions at Bries (Section 6.6, 1985-2000)

content	inner context	outer context	process
From (informal) comic library to formal (with VZW structure) shop and publisher VZW Breeze that specializes into young artists from the international small press movement.	Founder Ria Schulpen discovers small press comics and wants to promote and distribute them actively, instead of only (passively) having comics on stock in her library.	<p>In the 1990s the international small press movement grows fast. Explanations are the limited possibilities for young comic artists to publish their work in regular magazines, and the ambitions of these artists to work without (commercial) constraints, as autonomous artists. Internationally these artists form networks who meet each other at festivals, where they present their work to each other.</p> <p>The French alternative publisher L'Association, founded in 1990, has a catalyzing role in these developments.</p> <p>Ambitious small press artists look for publishers that can produce their work in a more professional way, without doing damage to their basic anti-industrial principles.</p>	<p>Schulpen published her first (small press) magazine of <i>Verdond Goed Tijdschrift</i>, with contributions from Belgian artists that she had met in Antwerpen and on comic festivals.</p> <p>Some of these artists also returned in her first comics produced as a formal publisher. For the anthology <i>Wind</i> she contacted artists that she had met at international conferences.</p> <p>She could pay the production costs by selling the books from her library.</p> <p>To reach an international audience, the first Bries comics were published in English. Schulpen kept her regular (paid) job at the Antwerp city library, so that she was not dependent on the income from VZW Breeze.</p>



# Appendix VIb Evolutions at Bries (Section 6.6, 2000-2010)

content	inner context	outer context	process
<p>Publishing of subsidized comics.</p> <p>Co-productions with comic publishers from other countries.</p>	<p>By means of subsidies (from governments in the Netherlands and Flanders) and co-productions with other publishers, Bries can share the risks and pay the costs of comics that fit within their publishing aims, but have a large chance of not being a commercial success.</p> <p>The co-productions also have the advantage of a wider (international) distribution.</p> <p>Schulpen discovers that it is difficult to export her English editions. Moreover, due to the new, Flemish programs dedicated to comic art at Belgian art academies there are more and more interesting Flemish artists that fit within the profile of Bries.</p>	<p>Comics are taken more seriously as a form of art and/or national culture. In France, the Netherlands (since the end of the 1990) and Belgium art funds (mainly since 2001) give subsidies to comic artists and comic productions.</p> <p>Co-productions are also attractive for other publishers, in order to share risks and limit costs. In the area of alternative comics, the risks are higher than in the more commercially oriented comics.</p> <p>Although most participants of the international small press can read (and speak) English, the infrastructure for distribution is different for each country. Local publishers are best equipped to distribute comics in their country.</p>	<p>The first Bries comic that is co-financed with money from an art fund is the magazine <i>Eiland</i> by two Dutch artists. After 2001 more albums by Flemish comics are subsidized.</p> <p>Bries co-produces comics from a German, a Dutch and a French artist with the Wallonian innovative publisher Frémok.</p> <p>Other co-productions are comics by a French artist with the French publisher Delcourt, and of a Dutch artist with the Dutch publisher De Harmonie.</p>

Appendix VIb Evolutions at Bries (Section 6.6, 2000-2010 continued)

content	inner context	outer context	process
Specializing in promoting young Flemish artists.		<p>The Flemish government decides to give young artists who aspire to become a professional comic artist a proper education. These programs already exist in Wallonia and France, and the competition from these countries (and countryparts) has become so fierce that a Flemish artist without a professional education hardly has a chance. There is a demand for these programs. Therefore art academies Flemish comic programs are started.</p>	<p>Bries publishes more and more comics by Flemish, less comics by artists from other countries, and less English language editions. In 2004 and 2007 the two bi-lingual (Dutch and English) <i>Hic Sunt Leones</i> anthologies are published (in a Dutch and an English version) that promote the work of the young generation of Flemish comic artists.</p>



# **SAMENVATTING**

## **(SUMMARY IN DUTCH)**

In de studie staan uitgeverijen van strips centraal, en de actoren en factoren rondom deze organisaties. Meer dan in veel ander bedrijfskundig onderzoek wordt in het proefschrift aandacht besteed aan de ontwikkelingen van het product (de strip) zelf en aan de scheppers ervan: in dit geval striptekenaars en -scenaristen. Juist dit artistieke aspect maakt de cultuurindustrie een interessant onderwerp voor organisatiekundig onderzoek. Hoe vinden organisaties in deze branche een balans tussen artistieke en economische waarden? De belangrijkste les die andere organisaties van de cultuurindustrie kunnen leren vloeit daaruit voort: hoe kan je effectief omgaan met tegengestelde krachten?

Binnen academisch onderzoek naar de cultuurindustrie staan veelal de film-, muziek- en uitgeverijwereld centraal. Publicaties over uitgeverijen zijn er dus wel, maar dan gaat het over educatieve of literaire uitgeverijen. Onderzoek naar stripuitgeverijen is zeldzaam. Dat is verbazingwekkend, want de stripsector laat een dynamiek zien die het tot een interessant onderzoeksgebied maakt. Het gaat dan om radicale veranderingen binnen de bedrijfstak zelf, die samenhangen met zowel veranderingen in de houding van de tekenaars en in de strips die zij creëren, als met een evolutie van het publiek en de perceptie door instituties van de strip als cultureel medium.

Elk land heeft zijn eigen stripcultuur, en strips zijn ook per land op een andere manier geëvolueerd. In dit onderzoek staan Europese strips en stripuitgevers centraal, en dan vooral die uit Nederland en België. Door de belangrijke rol die Frankrijk, samen met België, heeft gespeeld bij ontwikkelingen van de strip, speelt dit land ook een rol in het onderzoek.

Franstalige strips, zowel uit Wallonië als uit Frankrijk, domineren het Europese aanbod. Dit is een opmerkelijk fenomeen op zich, omdat het laat zien dat populaire cultuur niet per se uit Angelsaksische landen komt, zoals het geval is bij films en popmuziek.

Er is nog niet veel kennis verzameld over de invloed van de samenstelling van een cultuurindustrie op de culturele producten die ze voortbrengt. Dat geldt uiteraard ook voor de stripsector, want daar is nog nauwelijks onderzoek naar gedaan. Hoe hangen veranderingen van de strip samen met ontwikkelingen van de uitgevers, en op welke wijze heeft de samenstelling van de stripbranche gevolgen voor de strips die worden gepubliceerd? Vernieuwingen van strips kunnen in werking zijn gezet door tekenaars of andere partijen. Hoe beïnvloeden zij de uitgevers? Ten slotte is het interessant na te gaan welke factoren de verschillen ten aanzien van de stripcultuur tussen Nederland en België kunnen verklaren.

Als er sprake is van een sterke samenhang tussen ontwikkelingen van een populatie van organisaties en die van de producten die ze op de markt brengen kan dit worden uitgedrukt in termen van co-evolutie. De bedrijfskundige versie van de co-evolutie-theorie probeert verklaringen te vinden voor de manier waarop organisaties, producten en andere actoren en factoren op elkaar inwerken, en uiteen te zetten wat de gevolgen zijn van deze wisselwerkingen. Deze theoretische invalshoek lijkt zeer geschikt voor dit onderzoek.

De centrale vraagstelling van het onderzoek is daarom: welke co-evoluties vonden plaats in en rondom de stripindustrie in Nederland en België, en hoe kunnen ze de verschillende posities verklaren van strips en hun uitgevers in Nederland en België aan het begin van de 21<sup>e</sup> eeuw?

Theoretisch gezien is het co-evolutionaire perspectief interessant, omdat het een paraplu-benadering is die al eerder ontwikkelde, soms haaks op elkaar staande theoretische stromingen met elkaar probeert te verbinden. Dit uit zich onder meer in een benadering van organisaties op macro-niveau (een hele populatie van organisaties), gecombineerd met een benadering van organisaties op micro-niveau (afzonderlijke organisaties, en de afdelingen of individuen daarbinnen). Methodologisch houdt dit veelal in dat kwantitatief en kwalitatief onderzoek worden geïntegreerd. Aangezien evoluties tijd kosten, speelt de tijdsdimensie een belangrijke rol: het gaat bij co-evolutionair onderzoek vaak om ontwikkelingen over lange periodes.

In eerder verricht co-evolutionair onderzoek zitten gaten, die in dit proefschrift worden gedicht. Die hiaten betreffen zowel onderzoek naar organisaties in het algemeen als naar organisaties die tot de cultuurindustrie behoren in het bijzonder. Om die reden zijn voor verbetering van de theorie concepten gezocht die enerzijds afkomstig zijn uit stromingen die zich op alle organisaties richten, en anderzijds uit

disciplines die zich richten op kunst- en cultuurorganisaties. Een bijkomend voordeel van deze combinatie van theorieën die nodig is om het model te ontwikkelen dat aan het onderzoek ten grondslag zal liggen, is dat hiermee de meerwaarde voor bedrijfskundig onderzoek getoetst kan worden van combinaties van concepten uit bestaande theorieën. De visie hierachter is dat er al dermate veel organisatietheorieën zijn ontwikkeld, dat het beter is om al bestaande theorieën te verbeteren door ze met elkaar te confronteren, dan om er opnieuw een nieuwe theorie aan toe te voegen.

Een belangrijke tekortkoming in co-evolutionair onderzoek op macro-niveau betreft het gebrek aan aandacht voor de variëteit van organisaties in een populatie. Deze diversiteit kan leiden tot verschillende co-evoluties die tegelijkertijd plaats vinden, en dat verschil blijft onderbelicht. Voor het dichtmaken van dit gat wordt de organisatie-ecologie gebruikt, die zich net als de co-evolutionaire benadering richt op ontwikkelingen van populaties op lange termijn, maar juist wel de verscheidenheid aan organisaties onder de loep neemt. Verschillende stromingen die zijn ontstaan uit de organisatie-ecologie of er aan verwant zijn hebben tot concepten geleid die de demografische ontwikkelingen in een populatie verklaren, maar ook inzicht bieden in de legitimiteit van een sector, en in de samenhang tussen de samenstelling van de populatie met de overlevingsbronnen van de niche.

Ook de verschillen tussen landen in internationale niches komen in co-evolutionair onderzoek weinig of niet systematisch aan de orde. Het vergelijkend historisch institutionalisme biedt hier soelaas: deze stroming en de sub-stromingen die ertoe behoren, pogen verschillen tussen landen te verklaren die doorwerken op de effectiviteit van organisaties.

Op micro-niveau is de voornaamste tekortkoming van bestaand co-evolutionair onderzoek dat de rol van het individu bij co-evoluties weinig aandacht krijgt. Daarnaast geldt dat bij eerder co-evolutionair onderzoek naar kunst- en cultuurorganisaties de betekenis van kunst en cultuur voor het individu onderbelicht blijft, evenals de verschillende waardesystemen die in een kunstorganisatie naast elkaar kunnen bestaan en de verschuivingen hierin. Theorieën uit de hoek van 'institutional' *logics* en kunstsociologie besteden hier wel aandacht aan, en zijn zodoende ook in het model opgenomen.

Uiteindelijk zijn al deze concepten geïntegreerd in een centraal model. In vergelijking met eerdere co-evolutionaire modellen valt op dat zowel de nuancering

op macro- als op micro-niveau is vergroot. Beide worden als het ware scherper gesteld, dichterbij gehaald. Om die reden heeft het model, dat in het proefschrift wordt getoetst, de naam *vari-focusmodel* gekregen.

Vanwege de aandacht voor zowel micro- als macro-niveau, waren voor het onderzoek verschillende soorten gegevens nodig. Bronnen die een beeld geven van de historische ontwikkeling van de strip in Nederland, België, Frankrijk en andere landen werden opgespeurd en bleken voorhanden.

Voor de beschrijvende en analytische statistiek in het kwantitatieve deel is een database gebruikt die informatie bevat over bijna alle Nederlandstalige strips die ooit in Nederland en België zijn uitgekomen in een periode die 140 jaar bestrijkt: van 1858 tot 1998. De database bevat voor elke record de naam van de uitgever, waardoor nagegaan kan worden hoe groot de populatie per jaar is en hoe die zich door de tijd heeft ontwikkeld. Ook kan er onderscheid worden gemaakt tussen uitgevers van stripalbums en striptijdschriften.

In totaal bevat de database namen van meer dan 1.400 uitgevers, titels van bijna 27.000 stripalbums en van ruim 650 striptijdschriften. Aan de database zijn variabelen toegevoegd die betrekking hebben op het land van herkomst van de strip, van de uitgever, en van het karakter van de uitgever: is het een gelegenhedenuitgever die alleen om promotionele redenen een strip publiceert (een 'hit and run' uitgever), of een 'echte' uitgever?

Voor het kwalitatieve deel van het onderzoek is informatie nodig op individueel niveau en op organisatie-niveau. Om deze informatie te verzamelen is gekozen is voor een aantal case studies. De case-uitgevers zijn gekozen aan de hand van typologieën afkomstig uit de organisatie-ecologie. In Nederland en in België werden elk twee uitgevers gekozen, een grote en een kleine: VNU en Oog & Blik in Nederland, en Dupuis en Bries in België. Van de twee Belgische uitgevers was er één Vlaams en één oorspronkelijk Waals. Beide grote uitgeverijen kunnen worden aangeduid als 'generalist': ze produceren strips voor een breed publiek. Beide kleine uitgevers kunnen worden aangeduid als 'specialist': ze richten zich met hun vernieuwende, kunstzinnige strips op een kleine doelgroep.

Ook kunnen andere noemers worden gebruikt, eveneens afkomstig uit de organisatie-ecologie: VNU en Dupuis worden aangeduid als 'de alio' organisaties: dit zijn organisaties die oorspronkelijk uit een andere niche dan die van de strip af-

komstig zijn. Oog en Blik en Bries zijn ‘de novo’ uitgevers: vanaf het moment van oprichting waren ze al stripuitgever. Over elk van de vier uitgevers was al wel informatie beschikbaar, maar die moest worden aangevuld met eigen interviews met redacteuren en uitgevers. In de interviews ging het onder meer om de beweegredenen om strips uit te geven, de banden met tekenaars, de verschillende waarden in de uitgeverij, en ontwikkelingen in het uitgeefbeleid.

Uit de beschrijvende statistiek waarbij de database is gebruikt komt naar voren dat ondanks het relatief grote aantal stripuitgevers er steeds slechts een klein groepje veel publiceert en het merendeel juist heel weinig. Opmerkelijk is dat het stripalbum geleidelijk aan de rol van het striptijdschrift heeft overgenomen als voornaamste medium voor strips. Uitgevers die zich helemaal toeleggen op het uitbrengen van stripalbums domineren in de hele populatie pas sinds de jaren ‘90. Het aandeel van de oorspronkelijk Nederlandse strip op het totale aanbod is al sinds begin jaren ‘60 van de 20<sup>e</sup> eeuw kleiner dan het aandeel van de vertaalde strips. Van die vertalingen is het merendeel oorspronkelijk in het Frans verschenen.

Een volgende stap in het onderzoek is die van de statistische analyse. Hiervoor worden technieken gebruikt uit de organisatie-ecologie waarmee demografische patronen met betrekking tot de entree van de uitgever op de stripmarkt, en het weer verlaten ervan, kunnen worden onderzocht en verklaard. Voor dit doel is voor een steekproef binnen de hele populatie uitgezocht welke uitgevers nu een de alio identiteit hadden, en welke een de novo identiteit. De belangrijkste bevinding is dat lange tijd de alio organisaties de niche veel groter in aantal waren dan de de novo uitgevers. De identiteit van een niche wordt gevormd door de afkomst van de organisaties. In dit geval zien we dat de stripniche lange tijd is overheerst door organisaties die daar oorspronkelijk niet vandaan komen. Voor veel de alio uitgevers waren strips een secundair, afgeleid product. Dit in tegenstelling tot de novo uitgevers, voor wie strips veelal de eerste en enige reden van bestaan zijn.

Het is aannemelijk dat het langdurige gebrek aan legitimiteit van strips als onafhankelijk cultureel medium niet alleen verklaard kan worden door eigenschappen van het medium zelf, maar ook vanuit de identiteit van de organisaties die de strips op de markt brachten.

Voor na de Tweede Wereldoorlog begon de productie van stripalbums en van het aantal stripuitgevers te groeien. De al in de niche aanwezige uitgevers trokken nieuwkomers aan. Concurrentie werd steeds belangrijker, vooral sinds de jaren ‘80,



wat er voor zorgde dat specialisatie van de uitgevers toenam. Gedurende een lange tijd had de stripuitgevers niche een duale marktstructuur, wat inhoudt dat er een klein groepje grote uitgevers is dat strips publiceert voor een breed publiek (generalisten), en veel kleine uitgevers die voor specifieke doelgroepen strips maken (specialisten). Langzamerhand is de rol van de generalisten bescheidener geworden, en zijn specialisten een groter deel van de albums gaan produceren.

De meeste stripuitgevers bestaan slechts kort. Wel hebben Belgische uitgevers een grotere kans 'oud' te worden dan Nederlandse. Ook hebben uitgevers die een groot aantal albums en stripseries publiceren een grotere overlevingskans in de niche dan uitgevers die maar af en toe publiceren.

In het casushoofdstuk worden de vier uitgevers uitvoerig beschreven en geanalyseerd. Ze worden met elkaar vergeleken aan de hand van een aantal aspecten, waarin ten eerste de karakteristieken van de alio en de novo uitgevers centraal staan en met elkaar worden vergeleken, zowel ten aanzien van vermogen tot innoveren, aanpassingsvermogen, en verschuivingen van waardepatronen. Verder worden de verschillen tussen de Nederlandse en de Belgische uitgevers onderzocht.

De casussen laten zien dat er overeenkomsten zijn tussen de evoluties van de de alio uitgevers en van de de novos. In beide landen waren de de novo uitgevers niet alleen nieuw terrein aan het verkennen ('exploring' van de markt), maar gaven ze evengoed al bekende strips opnieuw uit ('exploiting'). Bij de alio uitgevers was het omgekeerde ook het geval.

De novo uitgevers zijn beter in staat om zich aan te passen aan de snel veranderende album markt. Maar sommige de alio uitgevers zijn eveneens tot aanpassing in staat, en kunnen zelfs een veel ingrijpender transformatie overleven: die van generalist naar specialist of polymorphist. Een polymorphist is een organisatie die zowel een kleine doelgroep bereikt met gespecialiseerde producten, als een breed publiek.

In beide landen, en voor beide typen organisaties, geldt dat esthetische en geïnspireerde waarden belangrijker zijn geworden. Dit heeft te maken met de ontwikkeling van het stripalbum en de emancipatie van de striptekenaar, maar ook met het feit dat lezers zijn meegegroeid met de strips: er zijn meer volwassenen dan vroeger die strips blijven lezen als ze ouder worden.

De verschillen tussen Nederland en België zijn te verklaren vanuit een institutioneel perspectief. Algemene maatstaven die te maken hebben met maatschappelijke kenmerken en die waren ontwikkeld voor vergelijkend onderzoek tussen landen op een hoog aggregatieniveau, waren niet afdoende om de verschillen tussen Nederland en België te verklaren, maar contextuele factoren bleken wel tot meer inzicht te leiden.

De verschillen zijn niet alleen beperkt tot die tussen Nederland en België, maar betreffen ook die binnen België, tussen Vlaanderen en Wallonië. Formele factoren die invloed hadden betroffen een Franse wet die tot censuur van strips in dat land leidde. Een invloedrijke informele factor was de culturele identiteit van België. Daarnaast speelden algemene omgevingsfactoren als geografische nabijheid en culturele verwantschap een belangrijke rol bij de verschillen tussen beide landsdelen in België.

Aan het eind van het onderzoek kon de hoofdvraag worden beantwoord. Er is sprake van gedifferentieerde co-evoluties binnen en tussen groepen uitgevers, en tussen artiesten en uitgevers. Dit houdt in dat er meerdere ontwikkelingen tegelijkertijd plaats vinden, die onderling aan elkaar gerelateerd zijn, en dat de evoluties niet voor alle organisaties en actoren in de niche in een en dezelfde richting gaan.

Deze co-evoluties hebben geleid tot een diffusie van innovaties met betrekking tot vorm en inhoud van strips. Vlaanderen en Wallonië hebben elk hun eigen stripcultuur, en in beide delen van België staat de strip er beter voor dan in Nederland.

Gedurende een korte tijd waren Nederlandse strips ook internationaal populair, maar het Nederlandse formaat (dat van de tekststrip) raakte uit de mode en werd niet aangepast. Ballonstrips, afkomstig uit Amerika, werden in Europa vooral populair gemaakt door Belgische tekenaars en uitgevers.

In Nederland is het stripaanbod nu een mengeling van oorspronkelijk Nederlandse en internationale invloeden. De actieve rol van België in het verleden, en de wil en het vermogen van Belgische uitgevers om zich aan de veranderingen aan te passen, hebben geleid tot hun relatief sterke positie, hoewel de rol van België bij de productie van strips voor de Europese markt is overgenomen door Frankrijk.

Na een periode waarin tijdschriften het belangrijkste medium voor strips waren, is dit overgenomen door albums. De albummarkt bood kansen voor kleine, gespecia-

liseerde uitgeverijen, waaronder ambitieuze, artistiek georiënteerde uitgevers, en had ook gevolgen voor de generalisten die de niche tot dan domineerden: deze werden gedwongen zich aan te passen aan de nieuwe eisen, of ze verdwenen.

Het feit dat gedurende een lange tijd de meerderheid van de uitgevers uit beide landen hun wortels niet in de strip zelf hadden, leidde tot een ambigue identiteit van de stripniche, die nog verder werd versterkt door de ‘fuzzy’ (vage, rafelige) eigenschappen van het medium zelf: de combinatie van tekst en beeld, de vage grens tussen tijdschrift en boek in het geval van seriematig verschijnende stripalbums. Dit maakte het moeilijk voor stripalbums om de status van onafhankelijk, cultureel medium te verwerven. De gebrekkige legitimiteit die hiervan het gevolg was liet zich vooral gelden in Nederland, en iets minder in België, waar strips eerder werden geaccepteerd als onderdeel van het culturele aanbod.

Veel de novo uitgevers die zich specialiseerden in strips waren veelal te klein en werkten te geïsoleerd om deze identiteit aan te kunnen scherpen in een bredere omgeving dan die van de kleine kring van stripwinkels en stripfans. Artistieke, vernieuwende uitgevers binnen de de novo’s kregen het wel voor elkaar om institutionele ondersteuning te krijgen, onder meer in de vorm van overheidssubsidies voor tekenaars, maar kregen eveneens maar moeilijk toegang tot reguliere boekhandels voor de distributie van hun uitgaven.

In beide landen hebben strips die het label ‘graphic novels’ van hun uitgevers meekrijgen de status van literatuur of van visuele kunst, en ze worden ook als dusdanig erkend door overheden en andere instituties. Naast deze vernieuwing in vorm, inhoud en marketingstrategie bestaat een substantieel deel van het strip-aanbod echter nog steeds uit op formules gebaseerde series die getuigen van het industriële verleden van het medium.

De belangrijkste theoretische bijdrage van het onderzoek is het aantonen dat een combinatie van verschillende concepten uit bestaande theorieën een meerwaarde kan hebben ten opzichte van het introduceren van compleet nieuwe theorieën. Deze meerwaarde is in dit proefschrift aangetoond. De integratie van theorieën in het vari-focus model maakte het mogelijk tekortkomingen van de afzonderlijke theorieën aan te vullen, en sterke punten van andere concepten meer te benadrukken. Het model bleek waardevol te zijn bij het bieden van inzicht in de evoluties op macro-en micro-niveau, en in de samenhang tussen beide vormen van evoluties.

De gaten die in de overkoepelende co-evolutionaire theorie waren geconstateerd, zijn gedicht. De diversiteit van organisaties in de niche leidde tot meer ontwikkelingen tegelijkertijd, als gevolg van kruisbestuivingen tussen verschillende actoren en factoren. Dit kan worden uitgedrukt in termen van gedifferentieerde co-evoluties. De verschillen tussen (en binnen) landen zoals die door institutionele, en andere omgevingsfactoren worden bepaald, en die ook door historische processen worden beïnvloed, dragen bij aan het verschillende verloop van de ontwikkeling van de organisaties. Ten slotte vertonen individuen en organisaties verschillen in de evoluties van waardesystemen. In tegenstelling tot wat wel gedacht wordt is het niet per definitie zo dat bij grote organisaties deze waardesystemen automatisch in de richting van commercie gaan. In deze studie komt naar voren dat onder invloed van kleinere, vernieuwende organisaties (de novo stripuitgevers) en artistieke ontwikkelingen, grote uitgevers juist ook een beweging in de omgekeerde richting maken, en juist méér aandacht hebben voor esthetische en artistieke waarden.

De bevindingen van het onderzoek leidden tot meer kennis ten aanzien van de invloed van de opbouw van een bedrijfstak binnen de cultuurindustrie op de culturele productie, en in algemene zin tot meer inzicht in de invloed van contextuele factoren op het functioneren van organisaties. De wijze waarop ontwikkelingen van afzonderlijke organisaties ontwikkelingen van een hele populatie kunnen raken, en omgekeerd, wordt hiermee inzichtelijk. Benaderingen vanuit macro- en micro-perspectief kunnen elkaar dus ondersteunen, maar het zal voor toekomstig onderzoek in andere contexten een uitdaging blijven om een combinatie van concepten en methoden te vinden die recht doet aan beide dimensies.

